

Data transfer



Exporting applicant and contact data to Arbor

Data is moved into Arbor from Admissions+ using the Data area of your platform; this guide covers the steps.

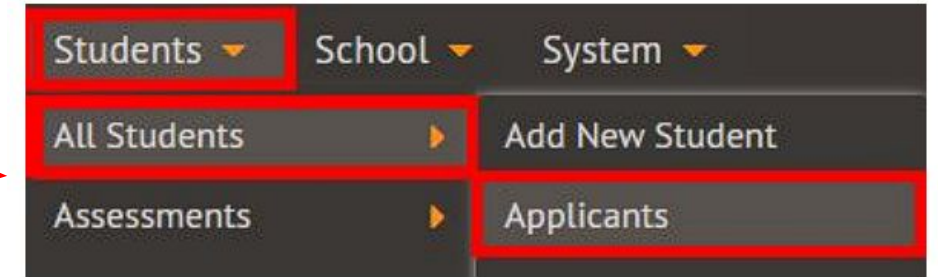
Prior to being able to export data into Arbor, you need to ensure you have created a **pre-admissions group in Arbor** to receive the new applicants into.

To cancel an Export that has already started, please contact Support for assistance.

Create an Intake Season in Arbor

1. Click **Students > All Students > Applicants**

If you do not see the Admissions options in your MIS you should contact your MIS Support Provider for assistance.



2. Click **Add**



3. Add to your Intake Season the following:

Academic Year (the fields **Start date** and **End date** will auto complete) If you are unable to select the required **Academic Year** you will need to add it first in your MIS by navigating to **School** → **School Structures** → **Academic Years**.

Intake season name

Published admissions number (optional)

Target application number (optional)

4. Click **Create Intake Season**

A screenshot of the 'Create Intake Season' form. The form has the following fields: 'Academic Year*' with a dropdown menu showing '2021/2022'; 'Intake season name*' with the text 'Year 7 2021/22'; 'Start date' with the text '1st Sep 2021'; 'End date' with the text '31st Aug 2022'; 'Published admissions number' with a numeric input field containing '150'; and 'Target application number' with a numeric input field containing '450'. At the bottom of the form, there are two buttons: 'Cancel' and 'Create Intake Season'. Red arrows point from the text in the previous block to each of these fields and the 'Create Intake Season' button.

Enrolling students to be exported

1. When your students are ready to be exported to your MIS they should be enrolled in Admissions+.

Student Profile Method
Bulk Student Selection Method

2. For Sixth Form students when they are put on their Courses their enrolment status will change to enrolled.

3. The Student Profile and Bulk Student Selection methods can also be used to enrol Sixth Form students if necessary.

Registered students / Student profile
Test Student #U-2F98

APPLICATION STATUS: Completed 0/6
ENROLMENT STATUS: Pending

Enrolment Status: Pending
Checked & Ready to Enrol
Change Enrolment Status

Joined Groups
Pending
Details to be checked
Ready to enrol
Enrolled

Advanced Filters >

Change Application Status Make Offer Change Offer Status Change Enrolment Status
Remove from group Communications Reset Password Change Colour Bulk Update

Displaying students 1-10 of 20 in total 20 rows selected

<input checked="" type="checkbox"/>	ID	Student Code	First Name	Last Name	Birthdate
<input checked="" type="checkbox"/>	16675	U-1EE8	Test Amara	Test Rau	10/10/2000
<input checked="" type="checkbox"/>	16881	U-351E	Test Anabel	Test Johnson	27/03/2000
<input checked="" type="checkbox"/>	16883	U-98B8	Test Anderson	Test Mayer	19/03/2000

Change Enrollment Status

Enrolled

To confirm enrollment status change, please type number that appears in the box below and click update.

20

Close Update

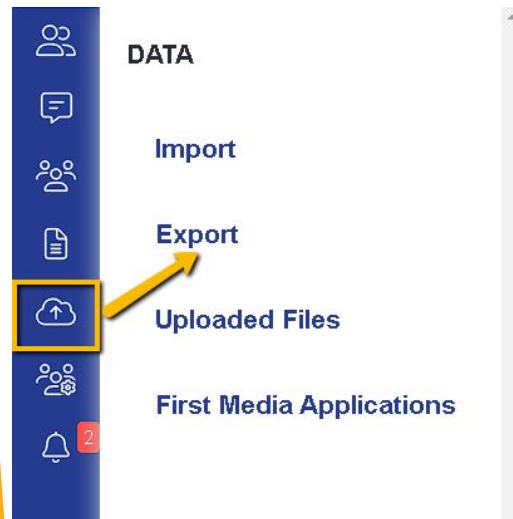
Exporting data into Arbor

Go to **Data > Export**

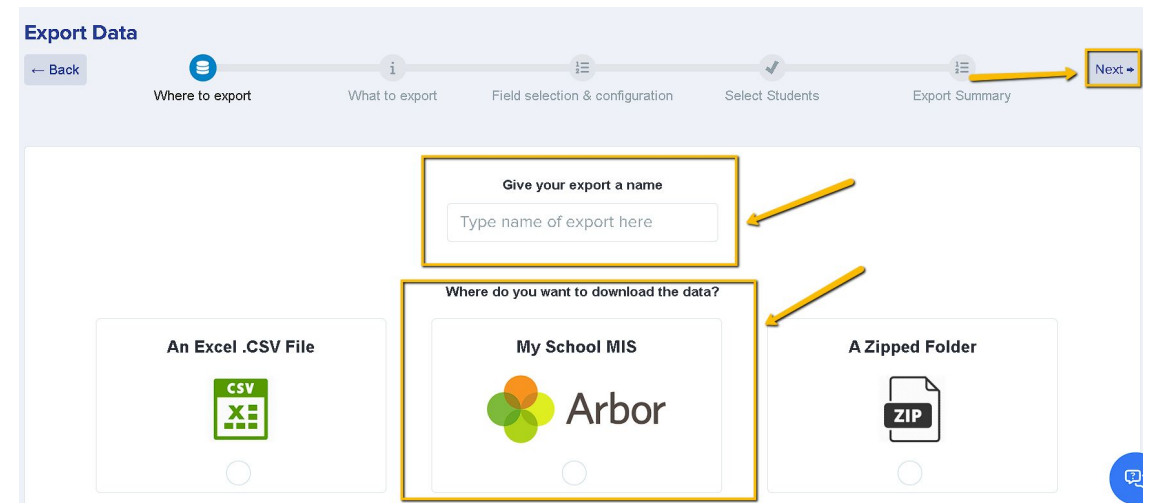
Click on **Start an Export** at the top right

Give your export a name then select **Arbor**

Click on **Next**



Start an Export



Exporting data into Arbor

You will then select **Students** then click **Next**

Then on the next step you will need to:

Select **Intake Season** e.g Reception 2021/22

Select **Intake Group** e.g. Intake Group 1

Select **Applicant Bucket** e.g. Applicant Bucket 1

Select **Academic Level** e.g. Reception 2021/22

There are additional Export Options available to select

The Data Mapping options will be preselected and now include **User Defined Fields**.

After that, click on **Next**.

Where to export | What to export | Data Mapping | Select Student | Next

What would you like to export?

Students
Data collected on forms. This includes data of their contacts.

Student Classes
Classes students have been enrolled into. Saving this to your MIS generates student timetables.

SELECT ARBOR INTAKE SEASON, INTAKE GROUP, APPLICANT BUCKET, ACADEMIC LEVEL

Intake Season^{*} | Intake Season Group | Applicant Bucket | Academic Level

Reception Intake 2021 - x | Intake Group 1 - 2022-06-01 | Application Bucket 1 - Reception Intake 2021 | Reception - 2021/2022

EXPORT OPTIONS

- Enable Address Update
- Export Declined Parental Consents
- Automatically assign a title to students (Ms/Mr depending on gender)?
- Remove student title on Arbor?

Next →

Exporting data into Arbor

On the next step, you may use the **Advanced Filters** and then **Select All** students for your export if required or you can select only the students you want to export.

Once done, click **Next**.

Advanced Filters ▾

Status ▾ 1

Properties >

Application Form Response >

Reference Form >

Exam Result >

Total Point Score >

Average Point Score >

Number Of Qualifications >

Additional Columns >

Student Type

Internal

External

Application Status

Incomplete

Awaiting Reference

Completed

Declined

Withdrawn

Deadline Missed

Waiting List

Enrolment Status

Pending

Details To Be Checked

Ready To Enrol

Enrolled

Enrolment Waiting List

Enrolment Declined

Offer Status

No Offer

Offer Made

Accepted By Student

Declined By Student

Offer Withdrawn

Interview Status

Pending

Complete

Accepted

Denied

Tag

Application Forms

All Application Forms

Filter
Save Filter

Next →

Column visibility Export Select all Deselect all

Showing 1 to 10 of 19 entries (filtered from 22 total entries) 22 rows selected

Show 10 entries Search: Test

#	Id	Student Code	arbor ID	First Name	Last Name	Email	Birthday	
4	2384	U-6E80	1213	Test Anthony	Test Effertz	student70694786ff112b07@admp.uk	25/06/2010	<input checked="" type="checkbox"/>
5	2420	U-79AB	1252	Test Aric	Test Little	atest1234@applicaa.com	11/08/2013	<input checked="" type="checkbox"/>
6	2048	C028	1157	Test Aurelio Oanh 28	Test Koelpin	studentf419623e6a775b4b@admp.uk	23/03/2008	<input checked="" type="checkbox"/>
7	2348	U-D833	1145	Test Camron	Test Nikolaus	teststudent1234@applicaa.com	08/04/2011	<input checked="" type="checkbox"/>
8	2423	U-7CC1	1254	Test Chance	Test Dooley	student1b9b4768f8013cc4@admp.uk	31/07/2010	<input checked="" type="checkbox"/>
9	2389	U-3F31	1214	Test Cleveland	Test Sipes	testcs1234@applicaa.com	12/10/2013	<input checked="" type="checkbox"/>
10	79	FT8C	855	Test Delphia Ha	Test Mohr	student9a6808ddb3eba537@admp.uk	20/01/2011	<input checked="" type="checkbox"/>
11	2136	U-BFFB	998	Test Felicia	Test Mueller	student048abc517eb368a7@admp.uk	08/12/2014	<input checked="" type="checkbox"/>
12	5	WYQD	848	Test Fred	Test Gaylord	cuongnm@gmail.com	06/05/2011	<input checked="" type="checkbox"/>
13	100	DIA2	862	Test Gaetano Oanh	Test Oberbrunner	student3ac1bea85650b752@admp.uk	23/04/2009	<input checked="" type="checkbox"/>

Exporting data into Arbor

On the **Arbor Student Mismatch Checking** step, potential mismatched students will be displayed if they are different in your MIS. Click on **Resolve** for each student in the **Unresolved Matches** list.

Arbor Student Mismatch Checking

Potential mismatch students!
We have detected that **1 student** you are exporting from Admissions+ seems to have changed since it was originally in your MIS. This could be intentional, for example if a student has changed how they spell their name, or they may have moved house.

Unresolved Matches 1 **Resolved Matches** 0

Admissions+ Students	Arbor Students	Resolution	Actions
Aaron Murphy	Aaron Murphy	Not resolved	Resolve

Resolve Potential Mismatch

Fields	Admissions Student	Arbor student
Name	Aaron Murphy	Aaron Murphy
Student ID	869	339
Gender	NOT_SPECIFIED	MALE
DOB	07/04/2004	07-04-2004
Telephone 1	+447700900529	
Telephone 2	+442084364751	
Email	aaron.murphy@arbor-mail.com	aaron.murphy@arbor-mail.com
Address	17 Test Lane SOUTHAMPTON Hampshire,SO16 9JW	136 Emlyn Road, W12 9TA
Contact 1	Mandy Murphy	Mandy Murphy
Contact 2		Mandy Murphy

Select resolution:

Ignore difference and continue exporting These are not the same person, unlink them

[Confirm & Next](#)

Select the **Ignore difference and continue exporting option** to confirm they are a match.

Select the **These are not the same person, unlink them** to confirm they are **not** a match.

Click **Confirm & Next** which will show the next student.

Exporting data into Arbor

Once you have selected an appropriate option for your student(s) they will appear in **Resolved Matches**. Click on **Change** to select a different option if required.

Arbor Student Mismatch Checking

ⓘ Potential mismatch students!
We have detected that **1 student** you are exporting from Admissions+ seems to have changed since it was originally in your MIS. This could be intentional, for example if a student has changed how they spell their name, or they may have moved house.

Unresolved Matches **0** **Resolved Matches 1**

Admissions Student	Arbor Students	Resolution	Resolved on	Resolved by	Change resolution
Aaron Murphy	Aaron Murphy	Ignore difference and continue exporting	08 Feb 2023, 12:38	Andy Applica Support	Change

Go to Student Matching

Click **Go to Student Matching** once all students have been checked.

Please note: If there are too many mismatched students you will need to contact Support or your Customer Success Manager, when this happens the message below will be displayed and you will not be able to continue with the export.

Arbor Student Mismatch Checking

ⓘ Potential mismatch students!

We have checked the data you are about to import, and multiple records in A+ seem to have changed significantly from when they were originally in your MIS. This appears to be the case with 14 records in this import... To prevent the possibility of corrupting the data in your MIS, we need you to contact technical support and/or your CSM, and they will be able to assist you in importing this data.

[Raise a Support ticket](#)

Exporting data into Arbor

In the **Arbor Student Mapping** screen, you will need to **Resolve** any **Unresolved Matches**

Arbor Student Mapping What should I do with matching students?

Potential duplicates detected!
We have detected that **12 students** you are exporting may already exist in Arbor. Please review the rows below and let us know if we should create a new person, or match it to an existing person?
This typically takes around 3 minutes to check.

Unresolved Matches 1 **Resolved Matches** 11

Admissions+ Students	Arbor Students	Matching Score	Resolution	Actions
Zztimmy Zztestington-Fryer-Sampsonanddelilah	Zztimmy Zztestington-Fryer-Sampsonanddelilah	<div style="width: 100%; height: 10px; background-color: green;"></div>	Not resolved	Resolve

Resolve Suspected Duplicates

Select Resolution

Merge to Arbor student #1
 Export as new student
 Skip this student

Field	Admissions+ Student	Arbor Student
Name	Zztimmy Zztestington-Fryer-Sampsonanddelilah	Zztimmy Zztestington-Fryer-Sampsonanddelilah
Student ID	2117	968
Gender	FEMALE	FEMALE
DOB	31/01/2006	31-01-2006
Telephone 1	+447727840999	
Telephone 2	+447727840969	
Email	jeff.clark1@appliance.com	jeff.clark1@appliance.com jeff.clark1@appliance.com
UPN		
ARN	823-2019-08-E-002117	
Address	17 Westwood Houses 45 Old Devonshire Road London W16 9RF	26 Westwood House, 47 Old Devonshire Road, SW12 9RF
Contact 1	jeff.clark1@appliance.com	jeff.clark1@appliance.com

Export Admissions+ student as a new Arbor student. This keeps information from both Admissions+ student and Arbor student as separate records.

Skip this student for now and decide later.

11 / 12 Resolved Confirm & Next

Next →

Select the **Merge to Arbor** student option to merge them with the selected student, there maybe more than one student displayed to select.

Select the **Export as new student** option to export them as a new Arbor student.

Select the **Skip this student** option to not export them.

Click **Confirm & Next** which will show the next student.

Click on **Next**.

Exporting data into Arbor

On the **Arbor Contact Mapping** step, existing Arbor contacts will be displayed if they match contacts in Admissions+. Select **New Contact** if they are not an existing contact in your MIS or **Skip Contact** if they should not be transferred. Contacts are matched using the following rules:

- The system looks through existing Arbor contacts, and finds any one who matches the name, title, email and postcode of the person on Admissions+
- Matching people are listed as 'Potential Matches'

Click Next.



The screenshot shows the 'ARBOR CONTACT MAPPING' interface. At the top, it says 'Potential Matches'. Below this, a message states: 'Admissions+ has identified several individuals in Arbor that might be a match for the people you are trying to export. Please review them below and for each potential match, please indicate which individual should be matched.' The interface is divided into two columns: 'A+ Contact' and 'Arbor Contact'. On the left, under 'A+ Contact', there is a progress bar showing '4 / 4' and '100%'. Below it, the contact details for '#1) Mrs Lily Plaine' are listed: '0888888888', 'HYDE Cheshire, SK14 9DT', and 'Carer of Happy Test Br1'. On the right, under 'Arbor Contact', there are two potential matches. The first match is for 'Mrs Lily Plaine' with phone number '0888888888', address 'HYDE SK14 9DT', and title 'Carer of Happy Test Br1'. This match is selected with a blue dot and has a green progress bar. The second match is for 'Mrs Lily Plaine' with phone number '0333333333', email 'pl@applicaa.com', and title 'Doctor of Happy Br2'. This match is not selected and has an orange progress bar. At the bottom, there are two radio buttons: 'New Contact' and 'Skip Contact'. Red arrows point from the 'Next' button to the 'New Contact' radio button, and from the 'New Contact' radio button to the 'Skip Contact' radio button.

Match To - links the Admissions+ contact to an existing Arbor contact, saves the Arbor Contact Id to Admissions+ and updates the available data from Admissions+ to the Arbor contact (see the data table for import rules)

New Contact - creates a new person in Arbor

Skip Contact - does nothing, the contact is not imported

Export Report

Once the export process has finished, click on the report to check the students that were exported successfully.

If there were any issues with the export you will see the reason in the **Arbor Notice** column for each student. In the example below the student exported successfully with no error.



#	View on A+	first_name	last_name	Arbor Notice	View on Arbor	Type
1	2420	Test Aric	Test Little		1252	Success

Click on the Arbor Student ID to view the application in Arbor

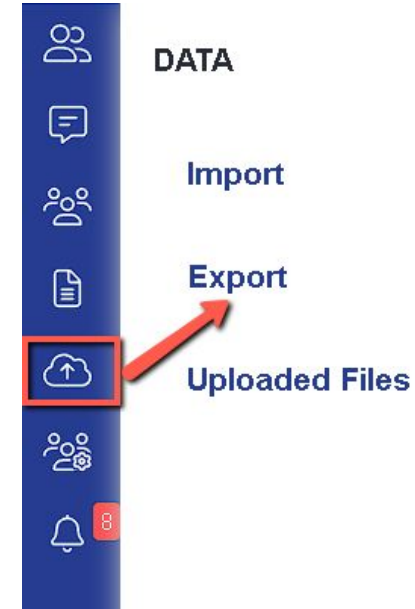


Let's see how it works!
DEMO

Exporting classes to Arbor

Before exporting classes to Arbor, your students will be enrolled to their chosen courses in Admissions+.

1. You will need to navigate to **Data > Export**
2. Click on **Start an Export**
3. **Give your export a name** then select **Arbor**
4. Then click **Next**



Start an Export

Give your export a name

Classes Export

Next →

Where do you want to download the data?



Exporting classes into Arbor

1. Select **Classes**.
2. Click **Next** to go to the **Mapping** step as shown in the example below.
3. Select a year using the **Filter By Academic Level** drop down. You can also filter your **Arbor Classes** by **Academic Year**.
4. Map your **Admissions+ Classes** to your **Arbor Classes**. If you can't see your classes click on See all Arbor classes.



Student Classes

Classes students have been enrolled into. Saving this to your MIS generates student timetables

← Back | Where to export | What to export | Data Mapping | Select Student | Next →

Select data you want to export

See all Arbor classes

FILTER BY ACADEMIC YEAR & LEVEL

Filter by academic year: 2022-2023 ×

Filter by academic level: Year 12 ×

MAP ARBOR CLASS AND ADMISSIONS+ CLASS

Showing 352 Arbor classes.

YEAR	ARBOR CLASSES	ADMISSIONS+ CLASSES
2022/2023	Chemistry Test Course	Select a value
2022/2023	Art and Design / Art KS3 Art SUBJECT_ART	KS3 Art: Year 9 - ACADEMIC_LEVEL_YEAR_9 1 enrolled ×



5. Click **Next** once done.

Exporting classes into Arbor

On the last step, the system will show you a preview of the data that will be exported.

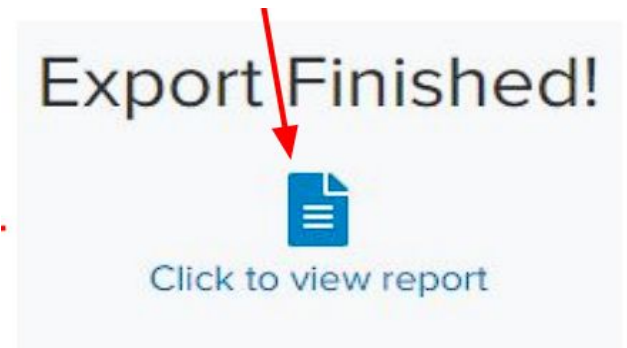
Click on **Next** and it will direct you a **Export Report**.



YEAR	ARBOR CLASSES	ADMISSIONS+ CLASSES
2022/2023	Art and Design / Art KS3 Art SUBJECT_ART	Art and Design / Art KS3 Art: Year 9 - ACADEMIC_LEVEL_YEAR_9 1 enrolled Test Tanner Test Daugherty

Click on the **report** to check the classes that has been **successfully exported**.

Status	Class code	Student ID	Student name	Arbor Student ID
Success	KS5 Art: KS5 Art and Design - 2022/2023	2423	Test Chance Test Dooley	1254



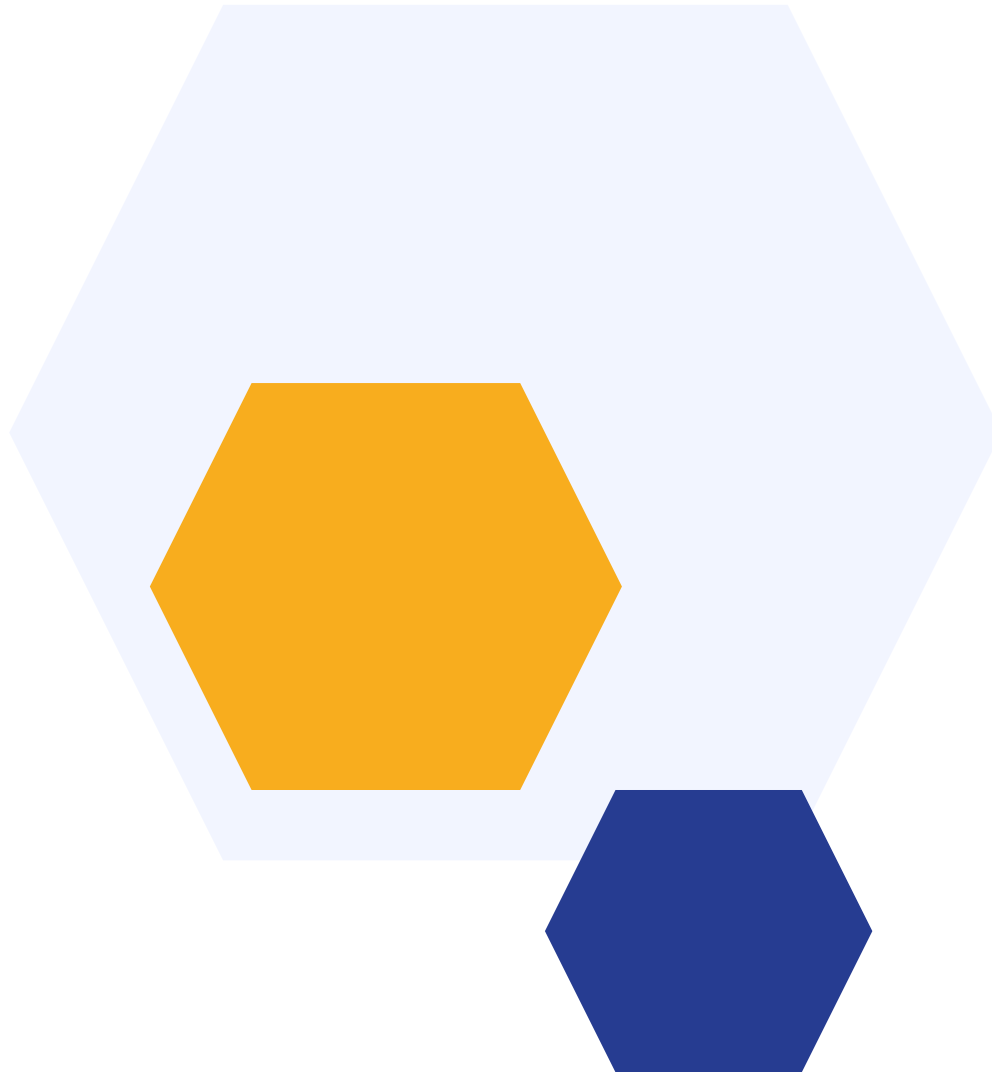
Export Finished!

Click to view report

The background features a central light blue hexagon. To its top-left is a grey hexagon, to its bottom-left is a dark blue hexagon, to its bottom-right is a light blue hexagon, and below that is a smaller light blue hexagon. To the right of the central hexagon is an orange parallelogram.

Let's see how it works!

DEMO



THANK YOU