

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.

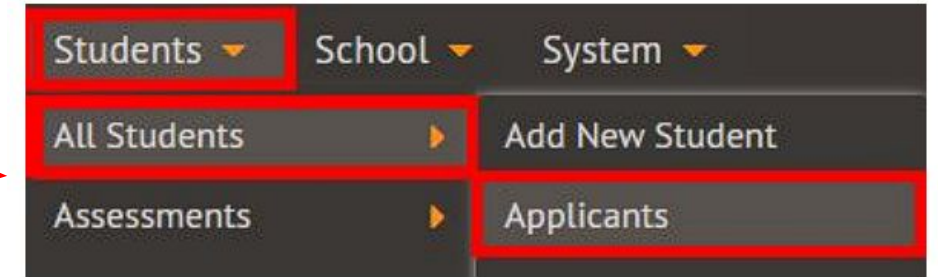
Prior to being able to export data into Arbor, you need to ensure you have created a **pre-admissions group in Arbor** to receive the new applicants into.

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 a text input field containing 'Year 7 2021/22'; 'Start date' with a date input field containing '1st Sep 2021'; 'End date' with a date input field containing '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 instructions to each of these fields and the 'Create Intake Season' button. The 'Create Intake Season' button is highlighted with a red box.

Exporting Students

Students can only be exported if their application status is “**completed**”.

Registered students / Student profile

Test Student #U-81EE

Phone
School
Email

APPLICATION STATUS **Completed** 2/2

ENROLMENT STATUS **Pending**

Overview | Data Collection Form | Activities | Interview | Courses Selection | Family | Visas | Concessions

Change Application Status | Make Offer | Change Offer Status | Change Enrolment Status | Change Int...

Change Colour | Bulk Update | Add to meeting | Export To PDF | Confirm Account | Steps status

Filter: registered students | View: Select a view

Displaying students 1-10 of 21 in total 21 rows selected

<input checked="" type="checkbox"/>	ID	Student Code	First Name	Last Name	Birthday
<input checked="" type="checkbox"/>	21876	U-50B4	Test	Jane	
<input checked="" type="checkbox"/>	21767	U-81EE	Test	Student	10/09/2007
<input checked="" type="checkbox"/>	21040	U-4DAB	Freddie	Curtis	

Change Application Status

Completed

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

21

Close Update

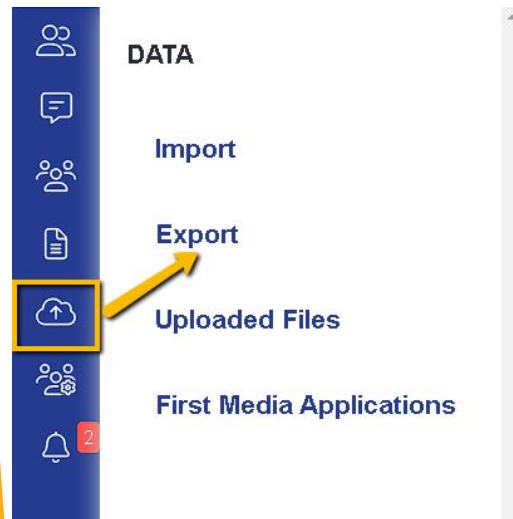
Exporting data into Arbor

Go to **Data > Export**

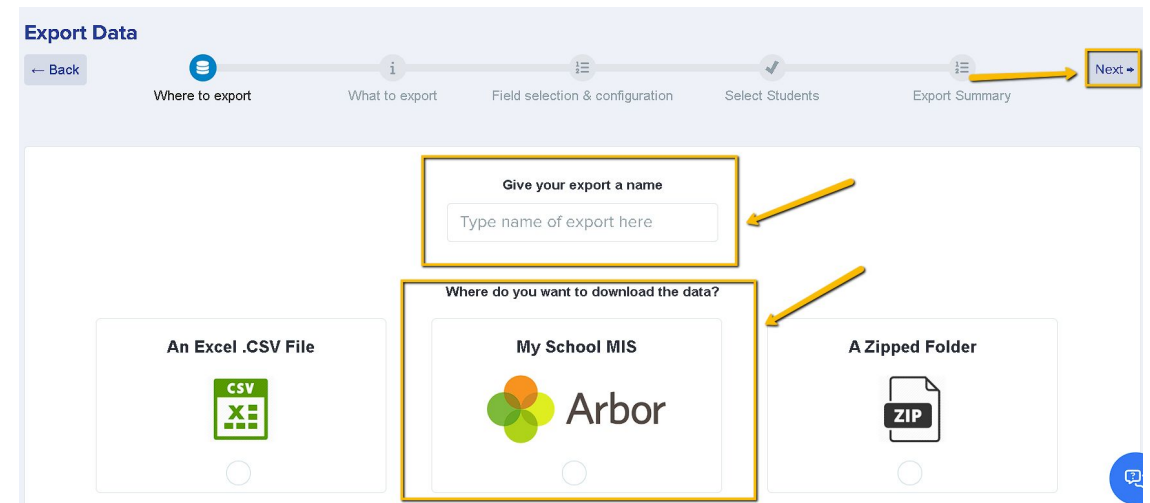
Click on **Start an Export** at the top right

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 x	Application Bucket 1 - Reception Intake 2021 x	Reception - 2021/2022 x

EXPORT OPTIONS

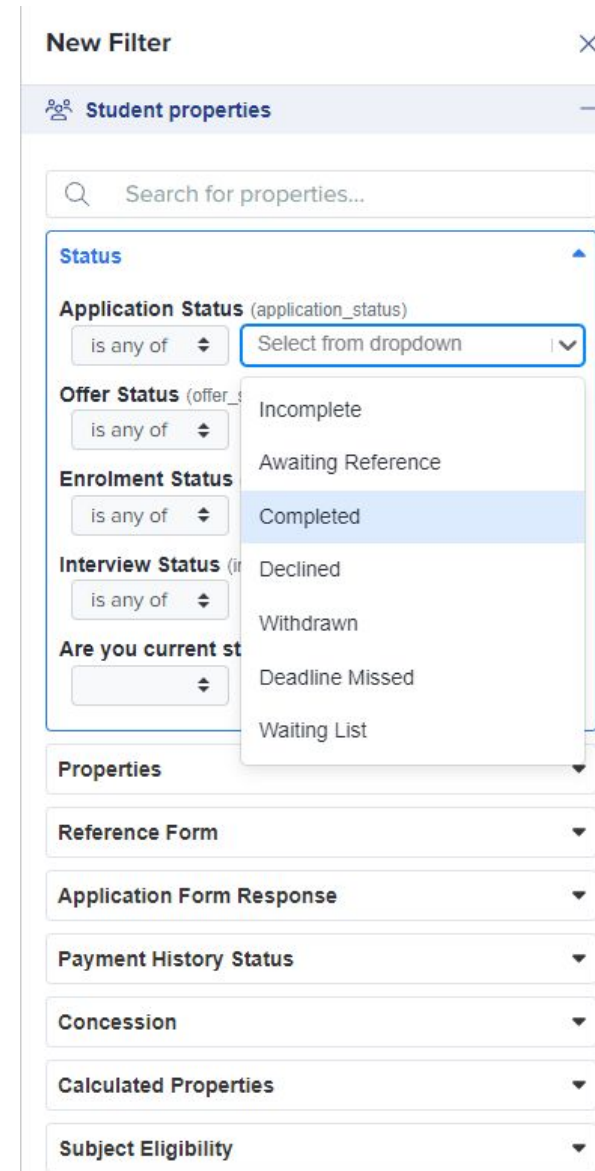
- Enable Address Update
- Export Declined Parental Consents
- Automatically assign a title to students (Ms/Mr depending on gender)?
- Remove student title on Arbor?

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**.



The screenshot shows a 'New Filter' dialog box with a search bar and several filter sections. The 'Status' section is expanded, showing a dropdown menu for 'Application Status' with the following options: Incomplete, Awaiting Reference, Completed (highlighted), Declined, Withdrawn, Deadline Missed, and Waiting List. Below the 'Status' section, there are several other filter sections: Properties, Reference Form, Application Form Response, Payment History Status, Concession, Calculated Properties, and Subject Eligibility.

New Filter [Close]

Student properties [Close]

Search for properties...

Status

Application Status (application_status)
is any of [Select from dropdown]

Offer Status (offer_s)
is any of [Dropdown]

Enrolment Status
is any of [Dropdown]

Interview Status (ir)
is any of [Dropdown]

Are you current st
[Dropdown]

Properties

Reference Form [Dropdown]

Application Form Response [Dropdown]

Payment History Status [Dropdown]

Concession [Dropdown]

Calculated Properties [Dropdown]

Subject Eligibility [Dropdown]

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 **6 students** 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 6 **Resolved Matches** 0

Admissions+ Students	Arbor Students	Resolution	Actions
Aaron Murphy	Aaron Murphy	Not resolved	Resolve
Abbie Adams	Abbily Adames	Not resolved	Resolve
Abigail Parker	Abigail Parker	Not resolved	Resolve

Resolve Potential Mismatch

Fields	Admissions Student	Arbor student
Name	Abigail Parker	Abigail Parker
Student ID	1162	462
Gender	MALE	FEMALE
DOB	26/06/2007	26-06-2007
Telephone 1	+447700900339	
Telephone 2	+442083705335	
Email	abigail.parker@arbor-mail.com	abigail.parker@arbor-mail.com
Address		2 Charecroft Way, W12 8QX
Contact 1	Joseph Parker	Joseph Parker
Contact 2	Theresa Parker	Theresa Parker

Select resolution:

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

2 / 6 Resolved [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 Applicaa 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.

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 82 records in this import... To prevent the possibility of corrupting the data in your MIS, we need you to create a ticket, so that we can have the team to take a look on it. [Download mismatch list](#)

[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 W, SW16 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+.

The process will detect any mis-matched contacts and prompt you to resolve them if any are found:

Export Data

← Back Where to export What to export Data Mapping Select Student Students/Contacts Matching Next →

Arbor Contact Mismatch Checking

Unresolved Matches 0 **Resolved Matches 1**

Admissions Contacts	Arbor Contacts	Resolution	Resolved on	Resolved by	Change resolution
Parent Demo	Parent 15 Demo 43 25	Ignore difference and continue exporting	24 Jan 2024, 08:02	Applicaa System	Change

[Go to Contact Matching](#)

Resolve Potential Mismatch ✕

Fields	Admissions Contact	Arbor contact
Name	Parent Demo ✕	Parent 15 Demo 43 25 ✕
Contact ID	2380	2447
Gender	MALE	Male
DOB		
Email	parentdemo@applicaa.com	parentdemo@applicaa.com
Address		

Select resolution:

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

1 / 1 Resolved [Confirm & Next](#)

Contacts are matched using the following rules:

- The system looks through existing Arbor contacts, and finds anyone who matches or closely matches the name, title, email and postcode of the person on Admissions+
- Matching people are listed as 'Potential Matches' - green indicates a strong match, amber is a partial match and red is a weak match.

Export Data

← Back Next →

Where to export What to export Data Mapping Select Student Students/Contacts Matching

ARBOR CONTACT MAPPING

Potential Matches

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.

9 / 9 (done)
100%

A+ Contact	Arbor Contact
<p>(#1) Ms Savita Behl ✉ +447700900168 +442087592806 savita.behl@arbor-mail.com Mother (natural or adoptive) of Kim Behl ✉</p>	<div style="border: 1px solid #add8e6; padding: 5px; margin-bottom: 5px;"><p>Ms Savita Behl 7700900168 2087592806 savita.behl@arbor-mail.com 13 Woodchurch Road, , NW6 3PL Mother of Kim Behl <div style="background-color: #008000; height: 10px; width: 100%;"></div>more details</p></div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"><p>Mr Saurabh Behl 7700900227 2081019337 saurabh.behl@arbor-mail.com 80 Balcombe Street, , NW1 6NE Father of Kim Behl <div style="background-color: #ffa500; height: 10px; width: 100%;"></div>more details</p></div> <p><input type="radio"/> New Contact <input type="radio"/> Skip Contact</p>
<p>(#2) Mr Parent 1 First Name Parent 1 Last Name ✉ 1234567890</p>	<p>Mr Parent 1 First Name Parent 1 Last Name</p>

Next →

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

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

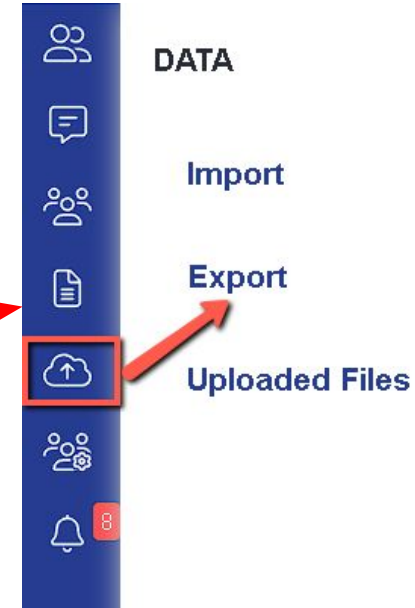
Click on the Arbor Student ID to view the application in Arbor

Exporting classes to Arbor

Before exporting classes to Arbor:

- your students will need to be enrolled to their chosen courses in Admissions+ and their status needs to be “enrolled”.
- your students will need to be enrolled in Arbor.

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**



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.

Export Data

← Back



Next →

Use the filters below to select the classes in your MIS that you will link to your Options classes.

See classes imported from Arbor

FILTER BY ACADEMIC YEAR & LEVEL

Filter by academic year

Filter by year group

Filter by subject

Three dropdown menus for filtering by academic year, year group, and subject.

MAP ARBOR CLASS AND ADMISSIONS+ CLASS

Showing 493 Arbor classes.

YEAR	SUBJECT	ARBOR CLASSES	ADMISSIONS+ CLASSES
Year 10 2023/2024	Applied Art and Design	KS4 Art: Year 10 ACADEMIC_LEVEL_YEAR_10	Select a value
2023/2024	Applied Art and Design	KS4 Art SUBJECT_AAD	Art and Design / Art
Year 10 2023/2024	Applied Art and Design	KS4 Art: Year 10: 10Ar/1 TEACHING_GROUP__Y10SET1	KS3 Art: Year 9: 9Ar/2 - TEACHING_GROUP__Y9SET2 0 enrolled KS3 Art: Year 9: 9Ar/1 - TEACHING_GROUP__Y9SET1 1 enrolled KS3 Art: Year 9 - ACADEMIC_LEVEL_YEAR_9 0 enrolled
Year 11 2023/2024	Applied Art and Design	KS4 Art: Year 11 ACADEMIC_LEVEL_YEAR_11	Citizenship
Year 11 2023/2024	Applied Art and Design	KS4 Art: Year 11: 11Ar/1 TEACHING_GROUP__Y11SET1	KS3 Citizenship: Year 9: 9Cz/2 - TEACHING_GROUP__Y9SET2 0 enrolled KS3 Citizenship: Year 9: 9Cz/1 - TEACHING_GROUP__Y9SET1 0 enrolled KS3 Citizenship: Year 9 - ACADEMIC_LEVEL_YEAR_9 0 enrolled
2023/2024	Applied Business Studies	GCSE Business Studies	Select a value

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

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

Export Finished!

Click to view report

Status	Class code	Student ID	Student name	Arbor Student ID
Success	KS5 Computer Science - 2023/2024	2729	Abraham Swaniawski	1784
Success	KS4 Mathematics - 2023/2024	2729	Abraham Swaniawski	1784
Success	KS5 Physics - 2023/2024	2729	Abraham Swaniawski	1784

Exporting Form Group Data

You can use the Sorting Hat wizard to assign students to Form Groups - find out more about how that works [here](#)

Once students have been allocated, their allocations can be exported and students will be assigned to those groups in Arbor - you can see the process [here](#)

Select data you want to export

Each column header below should be mapped to a property in Admission+. Some of these may be already been mapped based on their names. Anything that hasn't been mapped yet can be manually mapped to a property with the drop down menu. If you decide to not import a property just leave it unmapped and it will be ignored.

[See all Arbor registration form](#)

FILTER BY ACADEMIC YEAR

Filter by academic year

Start Date %d/%m/%y

End Date %d/%m/%y

Showing 2 Arbor registration forms.

MAP ARBOR REGISTRATION FORM AND ADMISSIONS+ SORTING HAT GROUP

YEAR	ARBOR REGISTRATION FORMS	ADMISSIONS+ SORTING HAT GROUPS
2023/2024	Form 7BG (2023/2024) Tutor: Alice Morgan	Form 7BG (2023/2024) - 2023/2024 - 4 students
2023/2024	Form 7GF (2023/2024) Tutor: Georgia Miller	Form 7GF (2023/2024) - 2023/2024 - 4 students

FAQs and Useful Links

Should I export my data in batches, or all at once?

Batches work best - perhaps 20 students at a time, until you get more familiar with the process and can then manage larger batches

When is the best time to export my applicants?

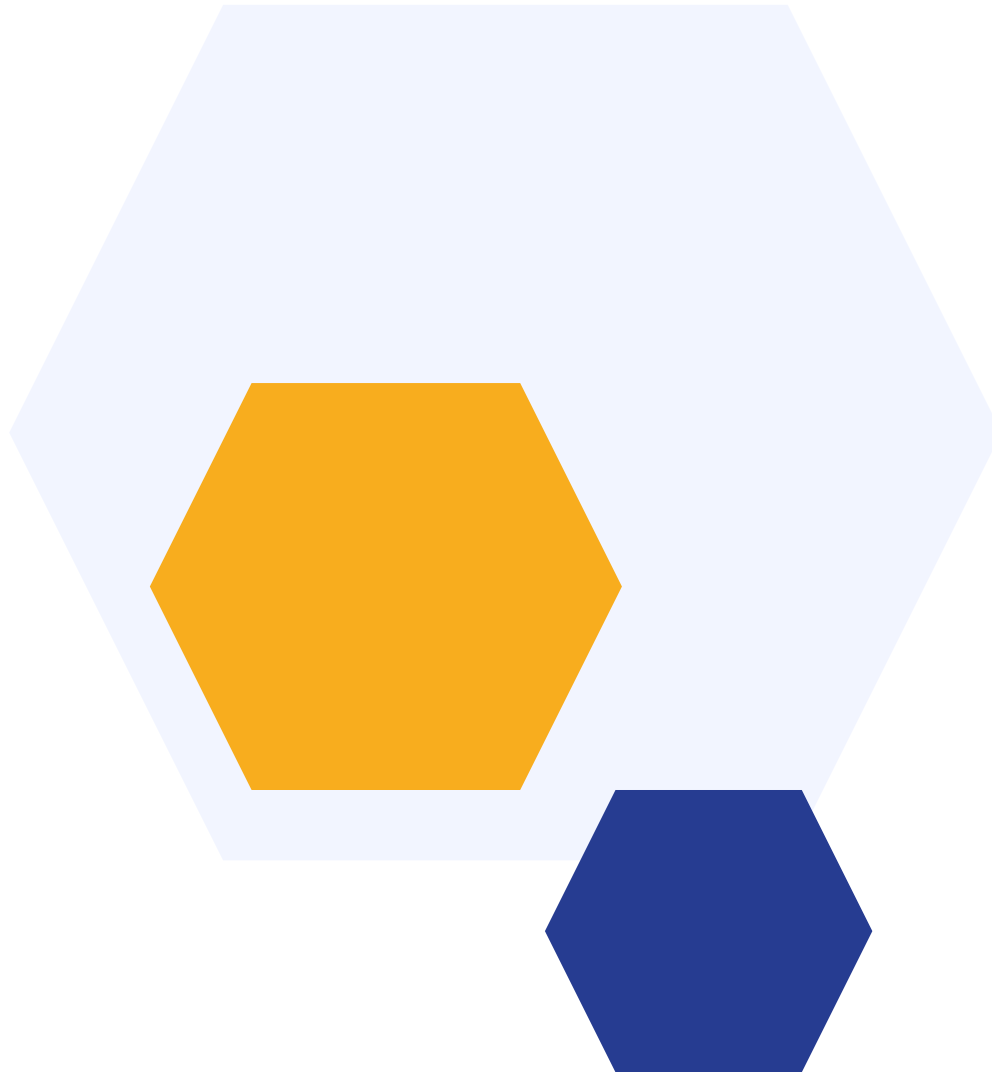
- You can export them as soon as they have completed your Admission Form (Y7, Primaries) - no need to wait until they are all complete; process in batches as above
- For Year 12, we suggest exporting as late as possible - after Enrolment; that way you minimise the amount of data being transferred and avoid having to delete lots of applicants from your pre-admissions area who never proceed to enrol with you

When should I import CTFs?

Please export your data from A+ first, and then import your CTFs directly to Arbor - you can read more on this [here](#)

Where can I find more information about exporting?

Guides and articles on importing and exporting data can all be located within the [Data & Integrations](#) area of our Knowledge Base



THANK YOU