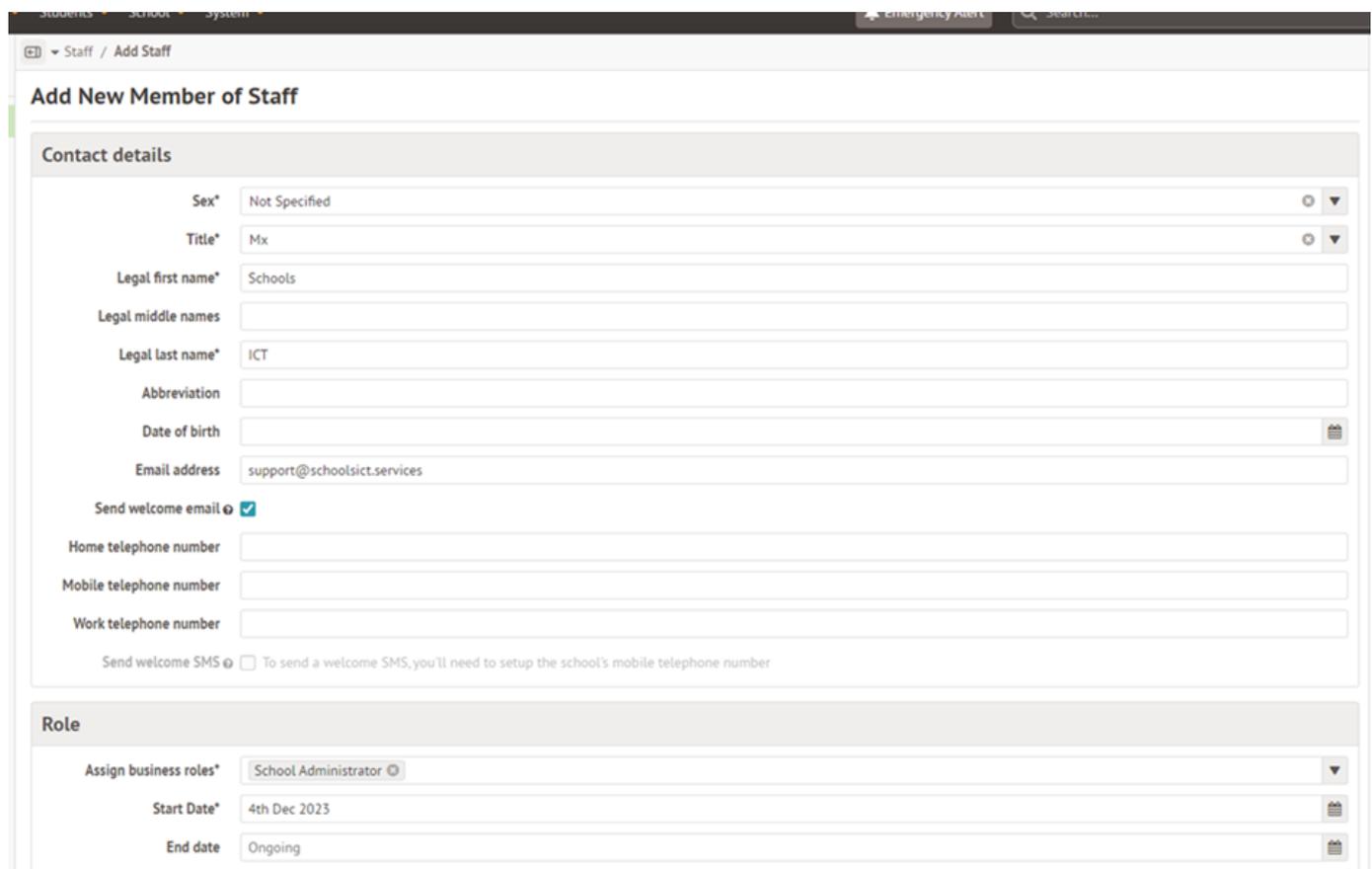# Post-Migration Checklist

Below are recommended processes following notification that your new Arbor system is live.

Schools ICT Access to Arbor System

To enable Schools ICT to support you effectively and efficiently in using Arbor as your MIS, we ask that you set us up an account, as a member of staff, on the system once your Arbor site is live. This will allow us to remotely access your Arbor MIS.

1. In Arbor, go to: School | All Staff | Add New Staff Member
2. Fill in the form as shown below and click the 'Create staff member' button.
3. Please add us in with this email address: support@schoolsict.services

Below is an example of the school's form:

Please note that as a user we should be assigned the Business Role of '**School Administrator'** and excluded from the Workforce Census (by clicking in the '**Contracts'** section of the staff record created for us and selecting '**No'** at the 'Include in school workforce census' option.)

Once this has been completed, we will receive a welcome email and will be able to complete the signup.

Thank you very much for your help in doing this for us.

Check Staff Permissions
Before you share your Arbor school URL with your school staff, please check <u>all</u> your staff permissions. You can print out All Staff Permissions from Arbor and check these are at the correct levels for all your various staff members. Ensure your other staff (e.g., teaching assistants, breakfast and after school's clubs, etc...) do not have more access rights than they should.
Business Roles and Permissions – Arbor Help Centre (arbor-education.com)
View and add Permissions to a Business Role – Arbor Help Centre (arbor-education.com)

Start to take Attendance in Arbor
Start to take your registers in Arbor (and manually enter the attendance between the date that your data back-up was taken and your go-live date). Also, check teachers have access to the registers for registration.
Attendance – Arbor Help Centre (arbor-education.com)

Check Nursery Registers *(If applicable)*
You may have noticed these being automatically enrolled registers for Reception by Arbor. You will need to check through your nursery sessions and correct attendance patterns before they will appear in a register. *Please log a call with the service desk who will guide you through this process.*
Enrol nursery into registers manually without Attendance Patterns (Irregular Attendance) – Arbor Help Centre (arbor-education.com)

Check your 3rd Party Apps
Check your 3rd party apps integrations – these will need to be tested and then approved. Check the data is coming through your 3rd party system correctly.
Setting up and managing third-party API integrations in Arbor – Arbor Help Centre (arbor-education.com)

Check your Migrated Data
Checking your Arbor Data Migration Report for Primaries – Arbor Help Centre (arbor-education.com).   How to check your data in Arbor for Secondaries moving to Arbor – Arbor Help Centre
Ensure that Next of Kin details for your staff members have not come through as 'unlinked guardians' and delete if necessary: Navigate to **School>Data>Data Quality>Guardians>Guardians with no linked students** to see your list.   How do we migrate staff Next of Kin? – Arbor Help Centre
Use the data quality dashboard to ensure the quality of your data and resolve any duplicate profiles that have been created: Using the Data Quality Dashboard to manage student, guardian, and staff data in bulk – Arbor Help Centre
For those migrating from ScholarPack: Add your Doctor's surgeries as Medical Institutions and link your children with them accordingly: Manage my school's Medical Institutions – Arbor Help Centre   Linking Doctor's Medical Practice information to a student – Arbor Help Centre
For ScholarPack, the following resources will support with any cross referencing in your previous system: Please use the following link for a suite of reports**:** Scholarpack - Reporting on Demographics

Check your Historic data
Before you sign off your data with Arbor, please ensure that you have your required historic data up until your data retention period for your school (for all specific sections i.e. EHCP and SEN pupils – linked documents are attached and also for those you are monitoring)