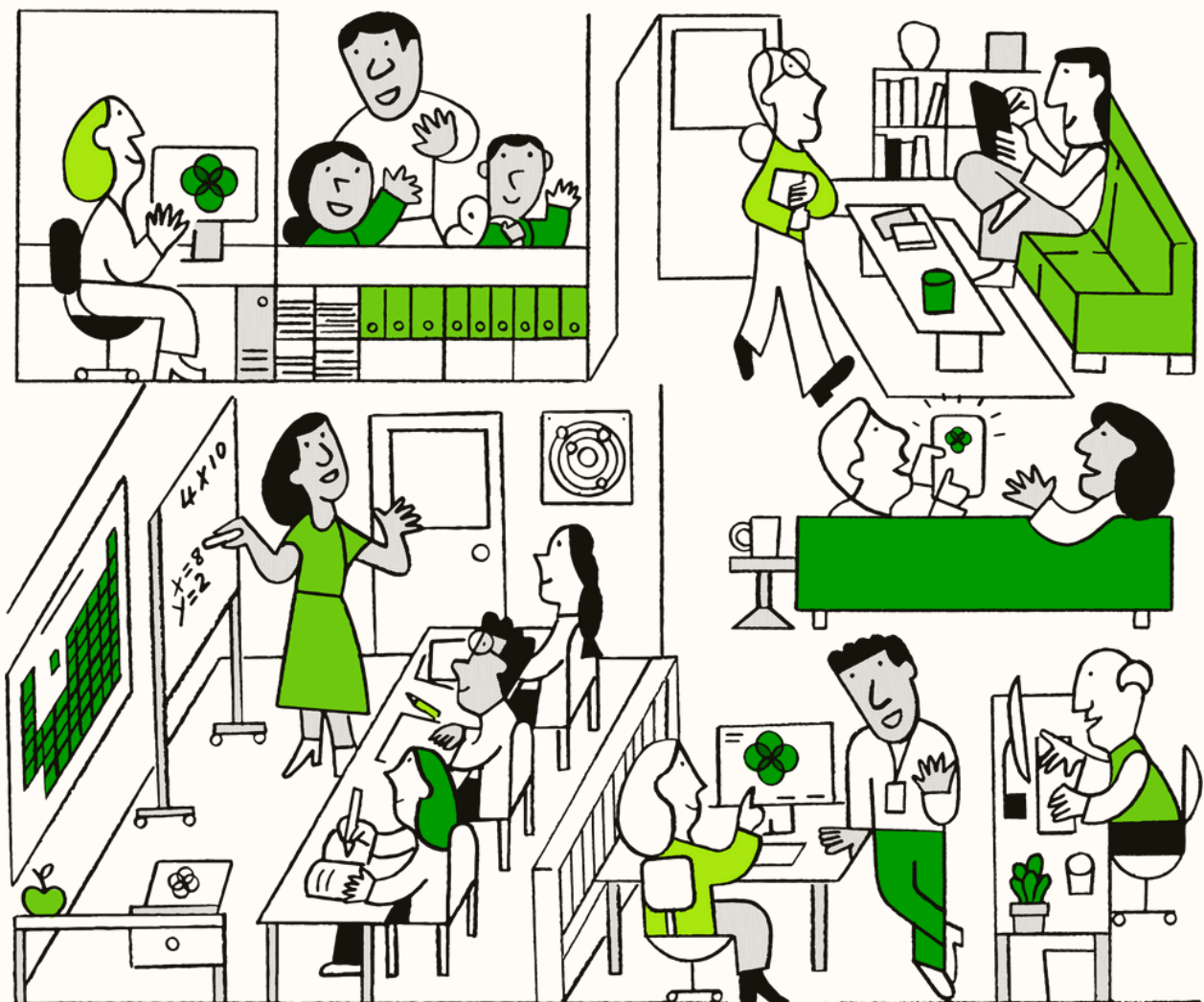


# Customer Product Guide

Everything you need to know as an Arbor trust



Arbor

# Everything *you need* to run your trust

## A note from Thanai, our Head of Customer Sales

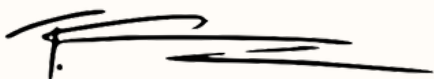
Here at Arbor, we believe that schools and trusts deserve the support of the best possible software and technology. The right tools can affect everything - how well you understand your students, how you collaborate and work together, and how equipped you feel in your role.

We believe that better tools can make the future of work in schools and trusts more productive and pleasant - and your MIS is only the starting point.

You've already taken the biggest step in transforming the way you work by switching to Arbor. Now, we'd love to introduce you to our full suite of best-in-class systems, tools, and services.

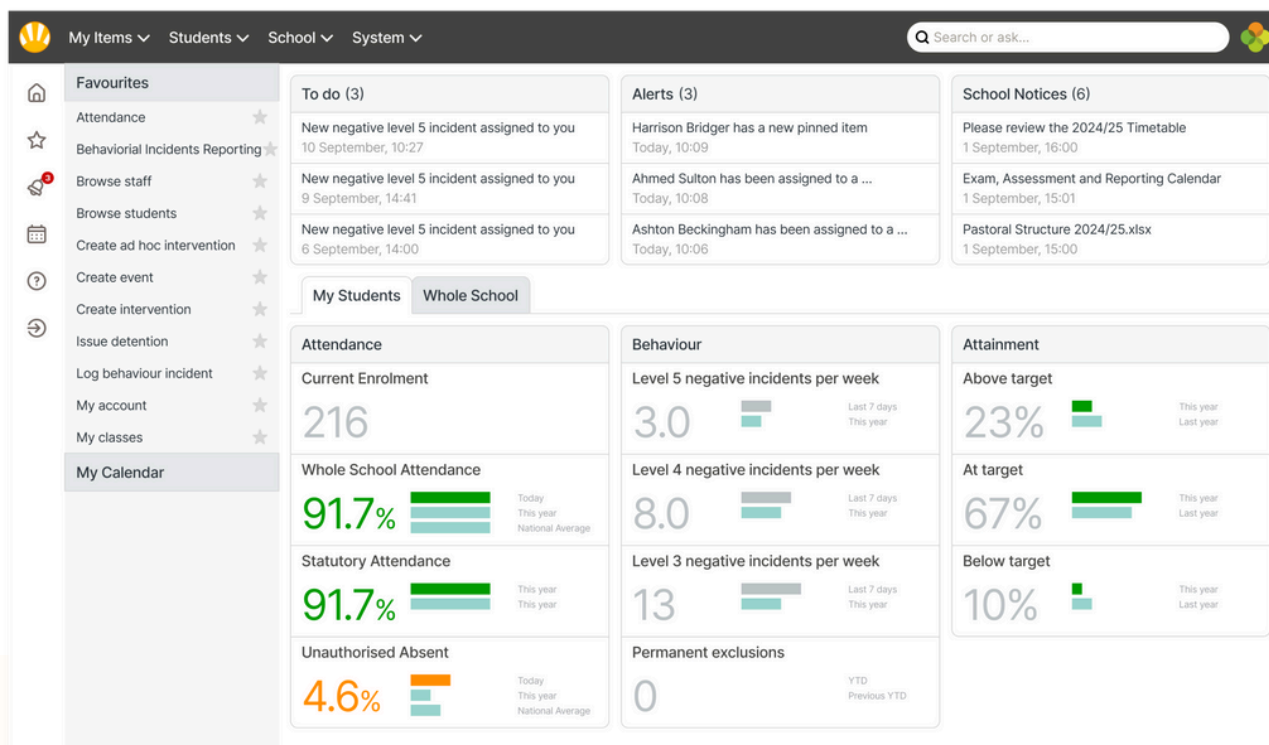
This guide is designed to help you get to know our complete offering, from MIS packages to data analysis tools, third-party integrations, consultative training, and much more.

We're thrilled that you've joined the Arbor community, and can't wait to show you everything that we do.



Thanai Coates,  
Head of Customer Sales





## Contents

### *Your MIS: The heart of your trust operations*

Make the most of your MIS  
 Transform your MIS into a strategic tool  
 More than a trust dashboard  
 Run and improve your trust

### *Additional tools: Enhance the power of your MIS*

SAMpeople integration  
 SAMpeople Data Connector  
 BI Connector  
 Google Classroom integration  
 Shared Teaching  
 SMS Subscription  
 Advanced Support  
 Arbor AI

### *Getting value: Use every part of your MIS*

Training to get the most out of Arbor  
 Introducing the Arbor School Management Suite

To purchase any of our products, get in touch with our friendly Customer Sales Team at [matcustomersales@arbor-education.com](mailto:matcustomersales@arbor-education.com)

# Make the *most* of your MIS

Arbor School MIS is the heart of operations and data for your schools and over 8,000 others across the UK. It includes everything you need to replace a legacy MIS system - but it can do a lot more.

Arbor can tackle much more than day-to-day tasks. If you're feeling bogged down in spreadsheets, siloed data, and additional systems, explore what else you could simplify or automate with a different Arbor package for your schools.

Bringing more workflows into Arbor not only saves time and money - it creates a shared home for all your data on students, staff and parents.

The screenshot displays two overlapping forms from the Arbor School MIS interface. The background form is titled 'Create Follow-up' and features a user profile for Tina Campbell, a 'Follow up with:' dropdown menu, and an 'SMS Template' section with a preview of a message about a student's absence. A green 'Send' button is at the bottom. The foreground form is a 'Top-Up' payment modal. It includes a 'Bill payer' dropdown menu with 'Katie Allen' selected, a 'Payment amount' field set to '£ 5.00', and a 'Reference' field with 'History Trip'. It also features 'Apple Pay' and 'Pay Now' buttons.



*“The biggest win for us is having family information, attendance, behaviour logs, assessment data and interventions all in one place so that we can track an individual or group or cohort easily and produce reports quickly. Now we work in real time and update information constantly.”*

Tony Berwick, Headteacher,  
Jubilee Wood Primary School

## Core

Everything you need to replace your legacy MIS and make every day easier

---

### Census Wizard

Complete your census quickly and easily without repeated resubmissions

### Arbor AI

Your new collaborator and assistant in Arbor, powered by OpenAI

### Attendance

Lightning-fast digital registers – no more paper

### Admin automation

Automatic escalation of tasks and chasing via email and SMS

### Report Builder

Build reports using any data point in Arbor, run them on a schedule

### Communications

Send and receive SMS and email, with a fully searchable log

## Comms

Engage with parents, students, and your wider school community from a single, unified platform

---

### Payments

Online and offline payments for meals, clubs and trips

### Arbor Parent App

Communicate with parents on the go

### Arbor Student App

Keep students in the loop and accountable

### Cashless catering

Manage cashless catering payments in just one place

### Behaviour workflows

Tailor your automated behaviour workflows to your school's policies

### Custom Report Cards

Build a completely customised report card that looks and feels like your school

## Perform

Drive strategic school improvement and join up processes and policies across your whole school

---

### My Classroom

Create seating plans and manage your class

### Apple and Google Pay

Give parents the flexibility to pay the way that suits them

### School Shop

Manage, see and sell all your school items together

### Intervention tracking

Instant insight into the effectiveness of your interventions over time

### Formative tracking

Track student progress and assessments the way you want to

### Staff Performance

Keep track of staff details, absences, appraisals and objectives

# Transform your MIS into a *strategic tool*

## Consolidate with Comms

- *Engage with your whole school community:* Communicate with students, parents, and staff - all from your MIS
- *Make payments easy:* Start taking payments and give parents one place for all their tasks
- *Tailor your daily workflows:* Create custom workflows and templates that better align with your unique policies and procedures

### *Did you know?*

*Schools typically save around £5,000 per year by replacing third party systems and bringing everything into Arbor.*



## Upgrade *and* upskill

With a whole new set of features at your disposal, equip your staff with the training to use your new package effectively

### Training to maximise your new Comms package:

- ✓ Parental Engagement
- ✓ Payments Setup
- ✓ Behaviour Consultation and Reporting

## Power-up with Perform

- *See the full picture of student progress:* Track students' formative progress and the effectiveness of interventions by linking spend to outcomes
- *Make payments completely self-service:* Consolidate your third-party system spend by bringing all things payments into Arbor
- *Comprehensive classroom management:* Bring your seating plans, registers and behaviour management together in one place
- *Support your teachers to do their best work:* Promote and track your staff's professional growth, with visibility over their own performance

### Training to maximise your new Perform package:

- ✓ Payments Plus
- ✓ Operational Reporting for Schools
- ✓ Arbor's BI Connector and PowerBI

"The Parent Portal was a huge win for us. We've managed to get 100% of our parents onto the portal, communicating with them, using the app, and reducing the cost of having to send out things via paper. It's completely changed the way we work. We don't send anything out on paper anymore."

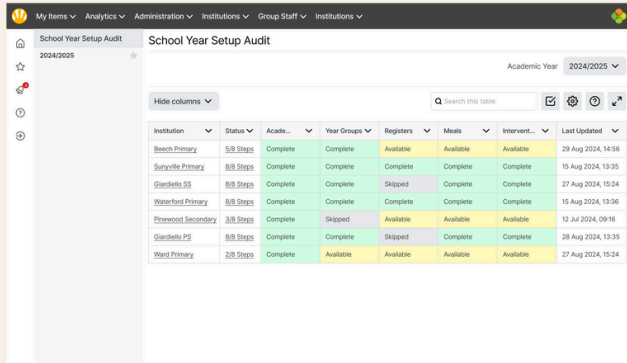
Debjani Mitra, Senior Administration Officer, Thomas Abney Primary School

# More than a trust *dashboard*

Arbor MAT MIS is your trust's mission control. More than just a dashboard, MAT MIS shows you what's going on across your schools, *and* gives you the power to take action centrally.

MAT MIS gives you the tools you need to run your trust - but it goes much deeper. Explore how to centralise policies, comms, and data across your whole trust with our market leading tools.

Bringing all your data into MAT MIS means you can make evidence based decisions, and spend your time where it's needed most.



Institution	Status	Academics	Year Groups	Registers	Meals	Interventions	Last Updated
Beech Primary	5/8 Steps	Complete	Complete	Available	Available	Available	29 Aug 2024, 14:56
Sunville Primary	8/8 Steps	Complete	Complete	Complete	Complete	Complete	15 Aug 2024, 13:35
Glacetto SS	8/8 Steps	Complete	Complete	Skipped	Complete	Complete	27 Aug 2024, 15:24
Waterford Primary	8/8 Steps	Complete	Complete	Complete	Complete	Complete	15 Aug 2024, 13:36
Phoenixwood Secondary	3/8 Steps	Complete	Skipped	Available	Available	Available	12 Jul 2024, 09:16
Glacetto PS	8/8 Steps	Complete	Complete	Skipped	Complete	Complete	28 Aug 2024, 13:35
Ward Primary	2/8 Steps	Complete	Available	Available	Available	Available	27 Aug 2024, 15:24



*“We continue to reduce the need for data to be populated outside of Arbor. What our Data Manager has been able to produce since using the new BI Connector is worlds apart from the previous version. That for us was the biggest reason to upgrade our MIS package.”*

David Kemp, IT & Data Lead,  
Thrive Co-operative Learning Trust

## Essentials

An extra pair of hands for your MAT

### **Automatically connects to Arbor MIS**

No fiddly set up required!  
MAT MIS works out-of-the-box

### **Login to MIS**

Click into your schools' sites straight from MAT MIS to follow up or take action

### **Custom reporting**

Build custom trust, school, student or staff reports

### **Benchmarking**

Compare performance against MAT averages, and against national, demographic and cohort level benchmarks

### **Trust-level dashboards**

See all your schools' data in one place, combining MIS, in-year progress and national data together

### **User permissioning**

Customise levels of user access to keep information secure

## Plus

The platform you need to take action centrally

### **Assessment policy pushdown**

Set policies at trust level and pushdown for consistency across your schools

### **BI tool integrations**

Connect your Arbor data to your BI tool and view your dashboards within your MIS

### **Email multiple groups**

Send emails to multiple groups of staff, students and parents across your MAT

### **New School Year Setup Audit**

Track your schools' New School Year Setup progress, and see which ones need help

### **Pay scale pushdown**

Centrally update pay scales in MAT MIS, then push them down to your schools with the click of a button

### **Census Audit**

See which schools have completed Census, and which need help

### **User defined fields (UDFs):**

Create unique UDFs for your trust and pushdown to schools

### **Parental engagement**

Monitor and analyse your schools' parental engagement levels from one central place

### **Mark and Cohort Level Analysis**

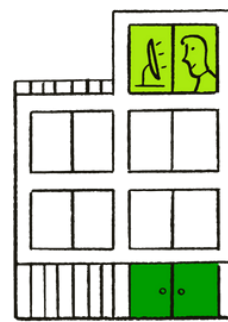
See every assessment mark for every student in your trust

## Enterprise

See all your data in one place in your own data warehouse, managed by Arbor

### **Custom Data Warehouse**

Load your data into our managed infrastructure so you can report on data from all your sources in one place



# Run and *improve* your trust

## Centralise with *Plus*

- *Align processes, policies and records:* Create consistency by rolling out trust- wide assessment policies, communication templates, pay scales or reporting frameworks.
- *Track census completion at MAT level:* See the status of each school's census, and be sure all are compliant with both DfE and trust level reporting
- *Centralise your communications:* Send emails to multiple groups of staff, students and parents across your trust, all from one place
- *Bring data to life:* Explore your data in new ways with Live Feeds and integrations with Excel, PowerBI and Google Looker Studio.



## Upgrade *and* upskill

With a whole new set of features at your disposal, equip your staff with the training to use your new package effectively

### Training to maximise your new *Plus* package:

- ✓ Arbor's BI Connector and Power BI for MATs
- ✓ Operational Reporting for MATs

## Expand with Enterprise



- *Data Warehouse as a Service:* Gives you your own personalised Data Warehouse for your trust, managed by Arbor. Get access to all your MIS data, with connectors and support to import and view external datasets too. It's everything you want from your own Data Warehouse without the time and expense.

*“The MAT MIS has, more than anything else, saved us significant time in the management of assessments and User Defined Fields. The ability to pushdown our assessment framework, which encompasses not just the assessments themselves but also various measures that form crucial KPIs at the school level, with a push of a button has made standardisation practically guaranteed across the trust.*

*Likewise, trust staff enjoy the level of control and security they have over the creation of UDFs, which cannot, for example, be deleted accidentally by school admin staff.*

*The audit dashboards which allow trust staff to track census and end-of-year processes have been very useful in ensuring these essential tasks are completed in a timely manner.”*

Syed Bokhari, Trust Lead for Data Systems and Support,  
Prince Albert Community Trust

# The *cherry* on top

Your MIS is just the beginning. We offer a number of extra tools and features to harness the power of your student and staff data all being in one platform, consolidate even more systems, and automate more workflows.

## Do more with your data

### SAMpeople integration

Free

Streamline your HR processes and workflows with a single source of truth for your HR data. Our integration with SAMpeople makes keeping HR data up-to-date quick and easy by removing the need to update two separate systems.

### SAMpeople Data Connector

Free

Stream your Arbor and SAMpeople data into your BI tool in a format that makes in-depth analysis quick and easy. Analyse your HR data alongside student data to see trends and make informed decisions.

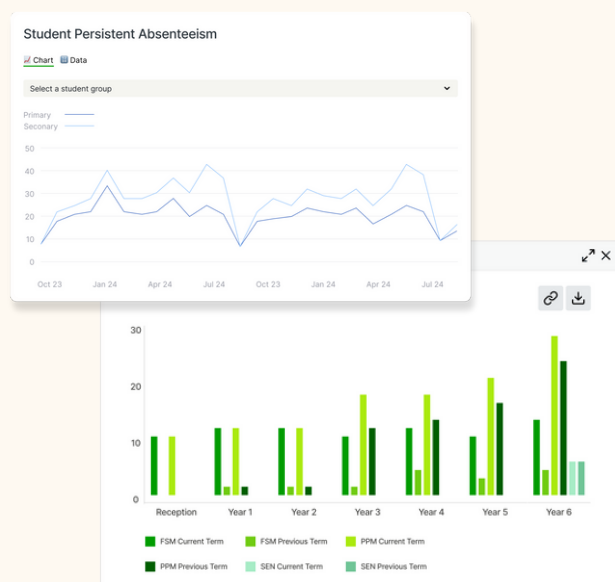
### BI Connector

£1,000

See all your Arbor data in your chosen BI tool. No need for a manual export, bring your MIS data to life with customisable visualisations and powerful data analysis. Plus, pull in any other data you want to build the insights you need.

### National Data Connector

Includes national Ofsted and IDACI data in your BI tool of choice.



# Free up your time

## Google Classroom integration

£750

Sync your course data, student enrolment and staff information between Arbor and Google Classroom™. Our direct integration saves you hours of manual entry and removes the need to maintain two systems.

## Shared Teaching

£1,575

Take the heavy lifting out of shared course set-up by reducing the need for manual processes and freeing up valuable admin time. Create courses, build shared timetables, and enrol students directly in Arbor.

“What Consortium were looking at when they procured Arbor was the potential to be more efficient and to save time, and Shared Teaching is definitely a part of that. The process of enrolment at the beginning of term now doesn't have to involve about three different people, just one person at the home school.”

Joanne Tuffs, MIS Manager  
at Consortium Academy Trust



THE CONSORTIUM  
ACADEMY TRUST

## Get expert, tailored support

Primary  
£1,313 /year

Secondary  
£2,625 /year

MAT  
£2,625 /year

## Advanced Support

For large schools with more complex needs, Advanced Support gives you a direct line to an expert who knows your set-up intimately and will respond the same day to any issues you have.

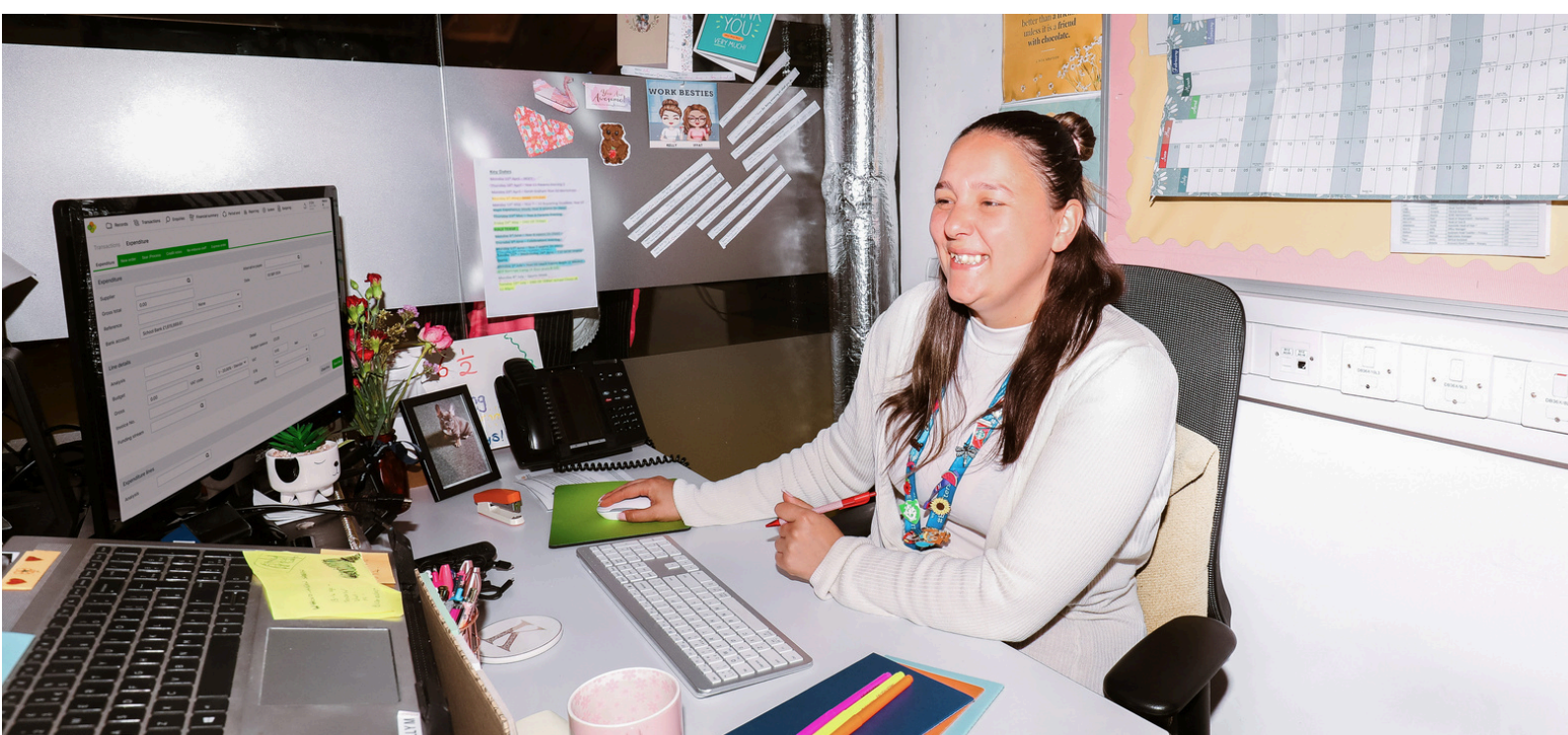
Plus, your dedicated Success Analyst will set you up with a bank of custom reports and live feeds.

## Streamline and simplify comms

## SMS Subscription

SMS Subscription is our annual SMS tariff that makes it simple to keep parents in the loop. Pay yearly and get the benefits of an ongoing subscription, including no regular top-ups and one annual invoice.

Our Customer Team can recommend a subscription based on your schools' student numbers and SMS usage.



# Your everyday tasks just got even easier with Arbor AI

Arbor AI is designed to be your time-saving assistant. With AI seamlessly integrated throughout Arbor, let us turn your requests into actions and make your everyday tasks even easier.

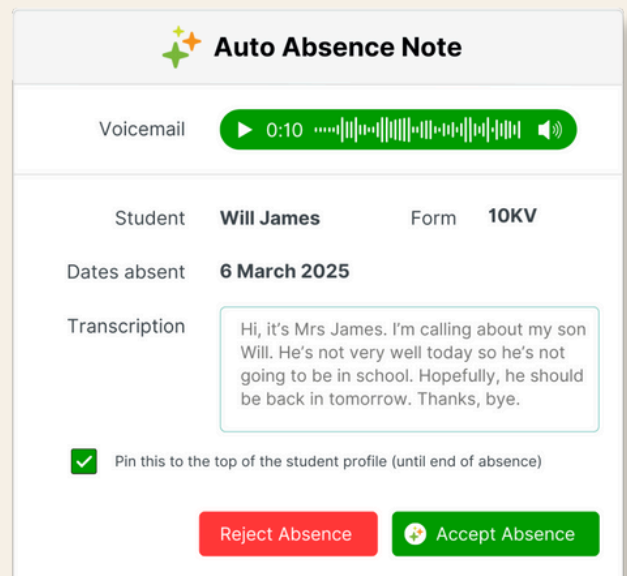
## Save at least one hour every morning

### Auto Absence

Arbor will listen to, transcribe, and log your absence voicemails every morning - assigning them to the right student and uploading them to Arbor. All you need to do is review and approve.

Primary  
£250 /year

Secondary  
£500 /year



**Auto Absence Note**

Voicemail **0:10**

Student **Will James** Form **10KV**

Dates absent **6 March 2025**

Transcription

Hi, it's Mrs James. I'm calling about my son Will. He's not very well today so he's not going to be in school. Hopefully, he should be back in tomorrow. Thanks, bye.

☒ Pin this to the top of the student profile (until end of absence)

**Reject Absence** **Accept Absence**

We're launching Auto Absence with a **20% introductory discount** until 31st August 2025.

*"[Auto Absence] means that our staff no longer have to sit on calls or listen to long voicemails. One click to adjust the absence code and save - that's it, that's how easy it is!"*

Kate Kinney, Data Systems Analyst, Baxter College

### A few more things Arbor AI can do...

Free

- ✓ Create an instant Student Summary
- ✓ Suggest a formula
- ✓ Draft an email, letter or SMS

# Training to get the *most* out of Arbor

We're passionate about educating our customers on how to get the most value out of Arbor, and use your MIS as a strategic tool.

Whether you're a brand new user of Arbor or a seasoned expert, we've got training options to cater to every role.

## Foundation

Foundation level training covers the basics of Arbor, getting you confident using Arbor for statutory requirements and essential day-to-day tasks.

## Intermediate

Once you've mastered the foundations of Arbor, our Intermediate level training supports you to use Arbor more strategically and start driving impact.

## Pro

Pro level training helps experienced Arbor users become experts in their role. Helping you drive long-term, strategic impact across your school or trust.

*"Arbor's comprehensive training resources and sessions have empowered our staff to make the most of their platform. The trainers are not only experts in their field but also excellent educators who make the learning process engaging and productive."*

Russell Bramhill, Director of MIS, Data & Timetabling at Castleford Academy Trust





## Foundation *for school teams*

### Primary School New User

£500

*For: All primary school staff*

A bundle of the 17 essential Arbor Foundations sessions primary schools need to get up to speed on Arbor. Includes one hour of Q&A time with an expert trainer.

### Secondary School New User

£600

*For: All secondary school staff*

A bundle of the 23 essential Arbor Foundations sessions secondary schools need to get up to speed on Arbor. Includes one hour of Q&A time with an expert trainer.

### Arbor Foundations: Meals and Payments bundle

£250

*For: School Business and  
Office Managers*

### Meals Setup and Management

Set up your meal offering in Arbor including meal provisions, meal prices. Plus, how to add sittings and set student meal patterns.

### Payments Setup

Set up and start taking payments in Arbor for meals, clubs and trips. Add bank accounts and see parent and guardian balances.

### Payments Plus

Set up your school shop and create rotating meal menus for parents to select their child's meal choices. Plus, set up Apple Pay and Google Pay.

## Foundation *for central teams*

### Arbor Foundations for MATs

£350

*For: All central team staff*

This session is designed specifically for trust central teams. Get to grips with the basics of MAT MIS, and start using it to collaborate across your trust and support your entire central team.

## Intermediate *for school teams*

### Parental Engagement

£250

*For: School Business and Office Managers*

How to set up and use the Parent Portal, Parent App, and Student App to maximise engagement.

### Assessment Consultation

£350

*For: Assessment Leads and Data Managers*

A consultation with an Assessment expert to dig into your needs and how to use Arbor Assessments in your school or trust.

### Live Feeds for Schools

£350

*For: School Data Managers and SLT*

Gain an understanding of what Live Feeds are and why you should use them. Learn how to create Live Feeds and build your own dashboards using your school data.

### Operational Reporting

£350

*For: School Headteachers and SLT*

Deep dive into Arbor's analysis dashboards and built-in reporting on key KPIs for Headteachers and SLT.

### Behaviour Consultation and Reporting

£350

*For: Behaviour Leads*

Consultation and setup of Arbor's Behaviour module, tailored to your school or trust's specific policies.

### Arbor's BI Connector and Power BI for Schools

£350

*For: School Data Managers and SLT*

Gain a deeper understanding of what the BI Connector is and the datasets available to you. Get an introduction to Power BI coding and learn how to create dashboards in Power BI using your MIS data.

## Intermediate *for central teams*

### Live Feeds for MATs

£650

*For: Trust Data Managers and Central Teams*

Gain an understanding of what Live Feeds are and why you should use them. Learn how to create Live Feeds and build your own dashboards using your school and trust data.

### MAT Operations bundle

£650

### Operational Reporting for MATs

*For: Central and Senior Leadership Teams*

An in-depth session on the reporting tools and analytics in MAT MIS, including bespoke reporting.

### Arbor's BI Connector and Power BI for MATs

£650

*For: Trust Data Managers and Central Teams*

Gain a deeper understanding of what the BI Connector is and the datasets available to you. Get an introduction to Power BI coding and learn how to create dashboards in Power BI using your School and MAT MIS data.

### People and HR for MATs

*For: Central HR Teams*

A dedicated session on the HR and people tools and functionality in MAT MIS, designed for your trust's HR team.



## Pro *for school and central teams*

### Arbor SENCO Core Accreditation

£450

*For: SENCOs*

Designed and delivered by SEN specialists, this course shows you the best way to manage your data and take action to support your SEN students. Price includes up to 3 staff.

### Arbor Assessment Advanced Accreditation

£350

*For: Assessment Leads and Data Managers*

Empower your Assessment Leads and Data Managers to become in-house experts in Arbor Assessments. Plus, share best practice with other schools. Price is per user.

### Arbor Exams Advanced Accreditation

£350

*For: Exam Officers*

Delivered by experienced Data and Exams Officers. Learn how to get the most out of Arbor Exams to best support your school and students. Price is per user.

### Bespoke Agenda

We offer bespoke training sessions tailored to your school or trust's needs. Work with our Customer Team to build a tailored training programme on the MIS areas of your choice.

£150

per hour, online

£950

per day, in-person

Systems that work alongside your MIS

# Introducing the Arbor School Management Suite

At Arbor, we're proud to be home to the UK's most-loved MIS *and* school management software. Bringing together the best-in-class, essential systems you need to run your school, support staff, and reduce workload.



Part of  Arbor

A complete HR system for schools and trusts, designed by education HR specialists. Already used and loved by over 1,800 schools and MATs, it's the UK's fastest-growing HR system today.

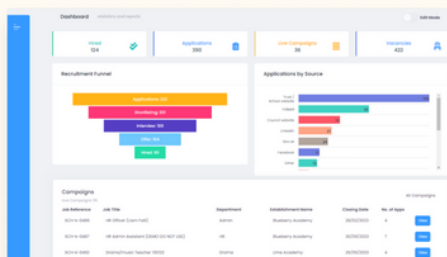
**With Arbor and SAMpeople together,** join-up the whole employee journey. Onboard new hires, track absences, and manage cover with two systems that work seamlessly together.

*"SAMpeople was our first venture into removing some heavy paper admin work. It's already making time savings and improving reporting processes."*

Hazel Goodwin,  
Ruskin Community  
High School



Designed by SAMpeople's recruitment experts. Hire the right people - and create the right impression - from application to onboarding. Syncs instantly with SAMpeople and Arbor MIS.

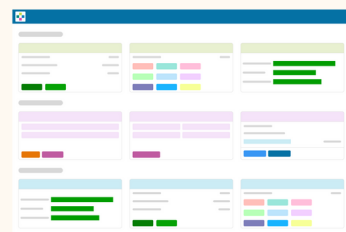


Get the input and support of highly experienced education HR advisors with over 20 years supporting schools on everything from contracts and leadership training, to full, ongoing HR and legal support.



The UK's leading timetabling software. Fast, friendly and powerful, it helps you tackle even the most complex timetabling challenges with confidence.

**With Arbor and TimeTabler together,** you can manage last-minute changes to rooms or staffing, and create reports on teacher workload and room usage.



With dedicated Options software, collect your sixth-form or GCSE subject choices and find the best solutions in the same powerful way.



*"It is no exaggeration to say that TimeTabler has reduced my workload by well over 100 hours. The investment has been worth every penny."*

Charles Brenan,  
Director of Studies at  
Newland House School

# Be part of something *bigger*

Great software is just the start.  
When you join Arbor, you join a  
whole community of schools who  
want to work better.

Join schools from across the country  
at ArborFest, our flagship annual  
conference that's packed with  
inspiring talks and workshops, both  
in-person and online.



“What I love about Arbor is that  
they’re always ready to change...  
They’re constantly bringing in  
new features and listening to  
what schools need.”

Luke Mulhall, Digital Strategy at  
King’s Group Academies



Have your say in where we go next. We update Arbor fortnightly, listening closely and responding to what you tell us. Help us shape the UK's best MIS.



Discover and share best practice year round through Arbor HQ, our *online customer community*.

Get in touch to  
find out more

**E** matcustomersales@arbor-education.com

**T** 0208 050 1028

**W** [www.arbor-education.com](http://www.arbor-education.com)