New School Year Setup Guide

For Secondaries, Secondary Specials and All-throughs

(schools with KS3 or above pupils and schools with Sixth Forms)

Version	Date	Updates
1	24/04/20	-
2	21/07/20	Added new option to copy over teaching groups and courses in step 6, and added more top tips
3	21/04/21	Updated for 2021 and new branding
4	15/06/21	Added guidance for My Classroom
5	07/07/21	Added guidance for Data Collections in Assessments
6	12/08/21	Added a link to bulk enrolment guidance
7	08/04/22	Updated for 2022
8	24/06/22	Updated guidance for various areas

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 can't find a solution in the Help Centre, click **Contact Us** in the top right of the Help Centre to get in touch.

Contents

Preparing for the Setup

Each Summer Term 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 doing this setup before you break up for the summer holidays. There's no need to wait until later in the summer, as the changes you make won't take effect until the new school year starts in September.

Before you start, gather the information you need using the **New School Year Setup Preparation Checklist**, available on the Help Centre [here](#).

Do we have to complete all the steps?

Some steps are optional depending on your Arbor package and requirements. If you don't use a certain area (such as if you don't use houses, you can mark the step as **Complete**.

Steps in bold are required for all schools:

- **Enter all your school dates for the year**
- **Off-Roll any Leavers**
- **Promote your current Year Groups and Registration Forms**
- Copy over any Custom Groups you have set up that you may want to use again
- Copy over Houses and House Enrollments into the new academic year
- **Enter the times for your Courses & Classes to create your Timetable**

- Copy over meals, meal sittings and meal choices for students
- Copy over any Interventions you will continue to run
- Set up other things you'll need next year, like Assessments and Behaviour

Finally, review your New School Year Setup. You're now ready for next year!

Can we come back to a step later?

If you need to come back to a step later to add more information you can! Just click **Skip for now** and put a reminder into your diary to come back to it later. When you come back, click **Resume progress**.

How can I get started?

The area for setting up your new school year can be found by going to *School > School Structure > School Year Setup*. This area of Arbor is locked until the **1st May**.

Once the 1st May has passed, the School Year Setup area will be open.

This Overview page lets you view your progress. You can jump in and out of the New School Year Setup so you don't need to do everything in one sitting! Your current step will be highlighted in red as 'Incomplete'.

Only when certain steps have been completed can the next steps be unlocked.

School Year Setup

Steps to prepare for the new academic year are locked until the Academic Calendar is filled in and marked as complete.

2021/2022	
1. Academic Calendar	Incomplete
2. Off-Roll Leavers	Locked
3. Year Groups & Registration Forms	Locked
4. Custom Groups	Locked
5. Houses	Locked
6. Courses & Classes	Locked
7. Meals	Locked
8. Interventions	Locked
Review School Year Setup	

Can we move students up early?

At your school, students might move into next year's subjects, lessons and timetable in June or July in the current academic year for a few weeks before the summer holidays. You should not use the New School Year Setup process to promote students early. Instead, please follow these instructions: Move students up to start the next academic year early

Step 1 - Create your Year

Go to **School > School Structure > School Year Setup**. Click on the first step to finalise your Academic Calendar for the next year.

Add the intake season

If you've already been using Arbor to [manage your applicants](#) for September's cohort, you can skip to the next step.

If you haven't been using Arbor to manage applicants, you'll need to add the next academic year and create an intake season. Do this by following [these instructions](#).

Create Academic Year

Academic year name*	2019/2020
Start date ⓘ	01 Sep 2021
End date* ⓘ	31st Aug 2020

Cancel   **Create Academic Year**

Set up the Academic Calendar

Once you have added a year, you will be able to see the rest of the New School Year Setup.

The next step is to set up your academic calendar (or check it has been set up correctly if it has already been created. Click the option for **1. Academic Calendar**.

1. Academic Calendar		**Incomplete**
2. Off-Roll Leavers	1. Academic Calendar	Locked
3. Year Groups & Registration Forms		Locked
4. Custom Groups	Academic Calendar setup is incomplete, click to resolve	Locked
5. Houses		Locked
6. Courses & Classes		Locked
7. Meals		Locked
8. Interventions		Locked
Review School Year Setup		

You can then complete the setup of your Academic calendar. This includes three sections to work on:

1. creating the academic year
2. setting up terms
3. setting up holidays

Make sure the academic year dates also cover the summer holidays, which are considered part of the academic year.

Academic Calendar

Academic Year 2021/2022		
Academic year name	2021/2022	▶
Dates	01 Sep 2021 - 31 Aug 2022	▶

Terms (2021/2022)	● Add
No terms have been added for 2021/2022	

Holidays (2021/2022)	● Add
Caution: No holidays have been added for 2021/2022	

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 2021 - 31 Aug 2022

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

💡 **Top Tip: 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	2021/2022
Term Name* ❓	Autumn
Short Term Name ❓	
Start Date* ❓	6th Sep 2021 📅
End Date* ❓	17th Dec 2021 📅

Cancel   **Add Term**

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 2021/2022		
Academic year name	2021/2022	▶
Dates	01 Sep 2021 - 31 Aug 2022	▶

Terms (2021/2022)		⊕ Add
Autumn	06 Sep 2021 - 17 Dec 2021	▶
Spring	04 Jan 2022 - 01 Apr 2022	▶
Summer	19 Apr 2022 - 27 Jul 2022	▶

Holidays (2021/2022)	⊕ Add
Caution: No holidays have been added for 2021/2022	

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 2021 - 03 Sep 2021
20 Dec 2021 - 24 Dec 2021
27 Dec 2021 - 31 Dec 2021
03 Jan 2022
04 Apr 2022 - 08 Apr 2022

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.

💡 **Top Tip: You do not have to include weekends.**

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

Add Academic Holiday

Holiday name	Early May Bank Holiday
Holiday type*	Public Holiday
Start date* ❓	2nd May 2022
End date* ❓	2nd May 2022

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 can use the **Half-Termly assessment period** for assessments, among other things.

If you have a remaining gap at the start of the academic year (due to starting the calendar as advised on 1st September), you can fill this with a holiday type of Vacation, as it is the final part of the summer vacation.

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.

Don't worry if you haven't yet added in your inset days - you can return to this step at a later date once you know when these will be.

For now, click **Mark Academic Calendar as Complete**.

Academic Calendar

Academic Year 2021/2022

Academic year name	2021/2022	▷
Dates	01 Sep 2021 - 31 Aug 2022	▷

Terms (2021/2022)   ⊕ Add

Autumn	06 Sep 2021 - 17 Dec 2021	▷
Spring	04 Jan 2022 - 01 Apr 2022	▷
Summer	19 Apr 2022 - 27 Jul 2022	▷

Holidays (2021/2022)   ⊕ Add

Summer	01 Sep 2021 - 03 Sep 2021	Vacation	▶
Autumn half term	25 Oct 2021 - 29 Oct 2021	Half-Term	▶
Christmas	20 Dec 2021 - 03 Jan 2022	Vacation	▶
Spring half term	21 Feb 2022 - 25 Feb 2022	Half-Term	▶
Easter	04 Apr 2022 - 18 Apr 2022	Vacation	▶
Early May Bank Holiday	02 May 2022	Public Holiday	▶
Summer half term	30 May 2022 - 03 Jun 2022	Half-Term	▶
Summer	28 Jul 2022 - 31 Aug 2022	Vacation	▶

Days Unaccounted For

All days have been accounted for.

Mark Calendar as Complete

💡 **Top Tip: To 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 **16 Apr 2021, 11:37**.

Click below return Academic Calendar to incomplete and make changes.

Return to incomplete

You must then again click the **Mark calendar as Complete** button to save your changes and enable you to continue editing the next sections.

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 17th December, but because the Christmas break holiday is set to start on the 17th December, this overrides the term dates. There will be no registers on the 17th of December.

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

To do this, click on 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 be scheduled to start on the 20th (Arbor automatically discounts weekends).

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.

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.

On this page, you'll also see in the Review section any students who have already left or have been given an end date within the current summer term, for example, if a year 10 student emigrated halfway through the year.

To Off-roll your leavers, click the **Off-Roll Leavers** field.

In the slide over, choose which year group to off-Roll leavers from (likely your Year 11). This will bring up a list of all students in the year (the list does not contain students who have already been marked as leavers).

You should confirm which students you would like to select (don't select any students who will be moving on to your sixth form) and add in their leaving date and their destination. **If you're not sure which leaving date or reason to put, please contact the DfE.**

💡 **Top Tip: 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.**

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.

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**.

Don't see the destination school you're looking for? You can add it to your [Linked Organisations](#).

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

Arbor Example School (27 Jul 2021)	1 student	*Create CTF for these students* ▶

New Full CTF Export (step 1 of 2)

CTF Details

Destination* | School in England Or Wales ⊗ | ▼ |

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**

💡 **Top Tip: Don't see the school name in the School field above? Click Back then select Unknown Destination in England or Wales to generate a CTF that can be imported into any school!**

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.

When the CTF is ready to download you'll get a notification in the top right of your Arbor site. Click the notification.

Don't see the notification? Click the refresh button in your browser.
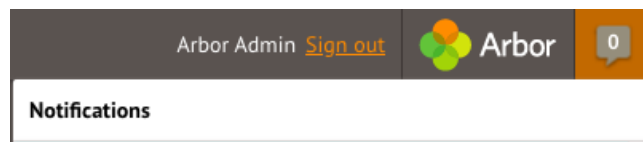
In the slide over, click the download button.

The CTF will then download to your computer into your default downloads file. You can then send the file to the destination outside of Arbor following your school's policy.
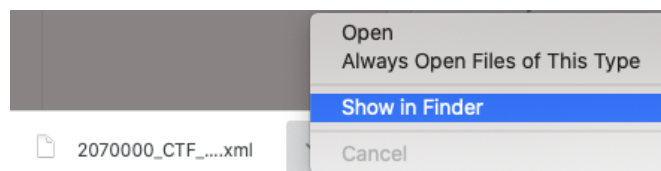
Mark the step as complete

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.
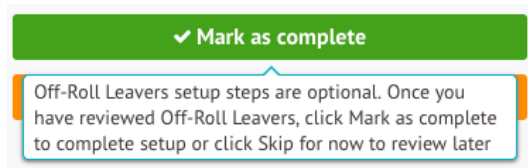
The Off-Roll Leavers section of the School Year Setup will then display as **Complete**.

School Year Setup

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.
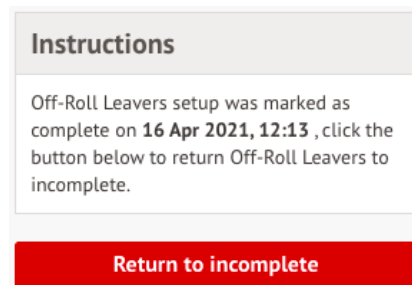
Step 3 - Year Groups & Registration Forms

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

Please note that your promotions will apply based on what is chosen here, and will not be updated if you move students between registration forms. For example, if you promote 7A into 8A, then move a student into 7B, they'll still be promoted into 8A.

Once you complete this step, Primary Guardians of your applicants will be able to log in to Parent Portal (if you have this module) to see and update details of their child once you send out their welcome email.

Year Groups & Registration Forms

Setup 2021/2022

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 2021/2022.	
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 2021/2022.	
7. Review and tweak registration form enrolments	Optional	▶

Review

Year Groups (2021/2022)   ⊕ Add

No Year Groups exist for 2021/2022

Registration Forms (2021/2022)   ⊕ Add

No Registration Forms exist for 2021/2022

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.

1. Copy year groups and registration forms Incomplete	▶

💡 **Top Tip: Don't worry if your registration forms will have different names next year.** Just copy over the number of forms you will need, then change the names later - you can see how to do this here: Change registration form and register name

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

Editing or adding year groups or registration forms

Click on a registration form to change or add teachers as Form Tutors.

Please note: If you do this after you've already completed Step 6 of New School Year Setup, you'll need to also add the tutor to the registers using these instructions: Change teachers

Form 7BG	Tutor: Alice Morgan	0 students	▶
Form 7GF	Tutor: Georgia Miller	0 students	▶
Form 8HV	Tutor: Abigail Knight	0 students	▶

Click on a year group to add a Head of Year.

Year 7	Head of Year: Georgia Miller	55 students	▶
Year 8	Head of Year: Barry Wilkinson	52 students	▶
Year 9	Head of Year: Christian Powell	52 students	▶

You can add additional Year Groups or Registration forms if needed by clicking **+Add**. You can also do this from *Students > Enrolment*.

Year Groups: 2021/2022

Academic Year: [2021/2022 ▼]

Listing	**Enrolments**

Year Groups for 2021/2022   ⊕ Add

Add New Year Group to 2021/2022

Academic Year	2021/2022
Year Group Name*	E.g. Year 1
Short Name	E.g. Y1
Curriculum Grade*	▼
Target Enrolment ❷	

Cancel | **Save Changes**

Assign tutors to year groups and registration forms

Click the **Assign Tutors** field to add this information.

Year Groups & Registration Forms

Setup 2021/2022		
1. Copy year groups and registration forms	15 out of 15 year groups copied, 28 out of 28 registration forms copied	
2. Assign tutors to year groups and registration forms	Incomplete	▶
3. Promote Year Group Students	0 out of 15 promoted	▶

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.

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.

Year 13 (2021/2022)

Heads of Year	Andy Green ⊗ ▼
Form 13HD (2021/2022) tutors	Hira Dyal ▶
Form 13IP (2021/2022) tutors	Isobel Price ▶

Cancel   **Assign Tutors**

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 to be entered 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** ▶
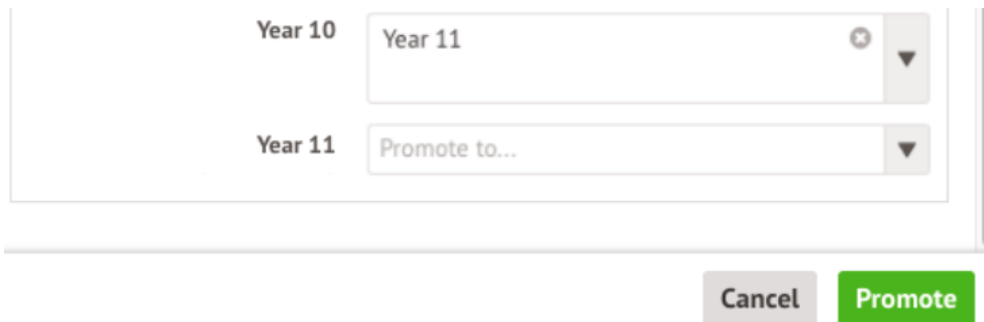
Promote year group students

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

Year Groups & Registration Forms

Setup 2021/2022		
1. Copy year groups and registration forms	15 out of 15 year groups copied, 28 out of 28 registration forms copied	
2. Assign tutors to year groups and registration forms	12 out of 15 year group tutors assigned, 25 out of 28 registration form tutors assigned	▶
3. Promote Year Group Students	0 out of 15 promoted	▶
4. Enrol Applicants	There are no applicants for the new school year	▶

Choose which year groups to promote students into. For example, below you can see all Year 10 students will be moved into Year 11.

You can also see that your highest year group is not automatically promoted. You can leave that field blank, then click **Promote**. When promoting your year groups in Arbor, you will always be at least one short.

Year 10	Year 11 ⊗ ▼
Year 11	Promote to... ▼

Cancel   Promote

Enroll Applicants

In this step, you'll be able to enrol your 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 2-5 in the article linked above, you'll be able to enrol your Applicants to be in the correct year groups and registration forms.

In **All Students > Applicants > Select intake season > Applicants**, make sure all the students you want to enrol have the Status of **Offer Accepted**. Tick the students who have accepted their offers.

1. Click the blue pencil icon to assign them to a year group.
2. Repeat, and assign them to a registration form.

	Student
Make offers	
Accept offers	1
Reject applications	
Withdraw students	
Transfer Intake Season	
Assign applicants to intake bucket	
Assign applicants to intake group	
Assign applicants to year group	2
Assign applicants to registration form	3
Assign applicants to house	
Enrol students	4
Email guardians	

When you assign applicants to a registration form, this will automatically also assign them to a year group, and potentially override a year group already input.

If the registration form is linked to multiple year groups, it will choose the one that was set up first.

We recommend checking that students have been assigned to the right year group before enrolling them. If they are not, you can repeat the Assign applicants to year group option to re-add them to the right year group.

3. Finally click **Enrol students**.

The students will then be enrolled in the Applicants section.

		Student	Status
☐	✎		
☐		**Allery** Lazar	Enrolled
☐		**Badsey** Brandon	Enrolled

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

If any remaining applicants have accepted a place but haven't yet been enrolled, click the **4. Enrol Applicants** option within Step 2 of the New School Year Setup to enrol these applicants.

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.

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

Cancel   **Enrol Applicants**

We enrolled applicants before adding a year group or reg form

If you have accidentally enrolled students before you have added them to a year group or registration form, you can undo the enrolment then add them to a Year group, Registration form or House. You can see how to do this [here](#).

When should we enrol applicants?

You'll be able to make changes to your applicants after you've added them, plus it's easy to remove enrolments for students who don't take up their place. Follow the instructions in this article to stop them from appearing in registers, communications and reports. You can see more information here: Do we have to enrol our applicants now?

Students are in the wrong year group or reg form

If you have accidentally enrolled students in the wrong groups or need to move them around, you can see how to do this here.

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.

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

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.

Student	Year 12 (2021/2022)
Allen Leah	Year 13 (2021/2022)
Bennett Vanessa	Year 13 (2021/2022)
Carter Elliott	Year 13 (2021/2022)
Chapman Francesca	Year 13 (2021/2022)

Promote registration form students

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 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 registration forms alongside Arbor's 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.

We recommend you promote each Registration Form to the form that the majority of students will be in next year. It's easy to move individual students to different classes, if required, in the Review and tweak step.

Year 9 (2020/2021) to Year 10 (2021/2022)

Form 9SN (2020/2021)	👥 Form 10CU (2021/2022)	⊗ ▼
Form 9WD (2020/2021)	👥 Form 10KV (2021/2022)	⊗ ▼

Year 10 (2020/2021) to Year 11 (2021/2022)

Form 10CU (2020/2021)		▼
Form 10KV (2020/2021)	👥 Form 11OX (2021/2022)	
	👥 Form 11VA (2021/2022)	

Cancel   Promote

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.

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.

Please note: You can only move students to registration forms in the same year from here. To move a student to a reg form in a different year, they'll need to be added to the year group.

Resolving students without an enrolment
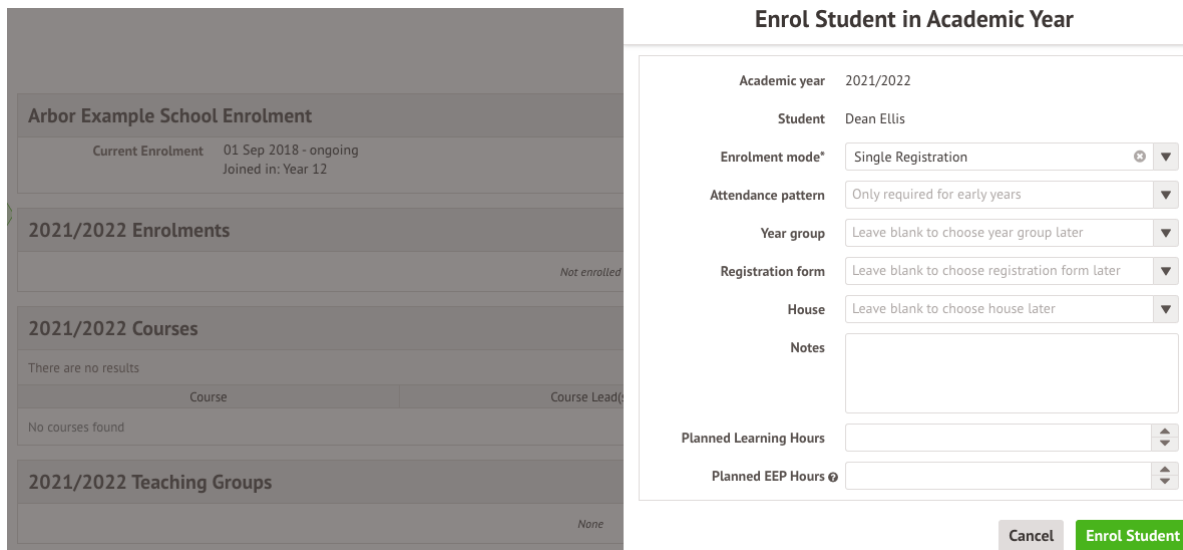
If you have any students who were not assigned a year group this academic year, they will not have been promoted to the next year group during **Step 2**. Instead, these students will appear in the **Review** section.

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.

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

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 enrollment. Click the student's name to visit their profile.

Click their enrolment in your school.

In the slide over, click the orange **Edit** button. You can then:

- Unenrol the student if they no longer attend by clicking **Unenrol Student**.

- Delete their enrolment completely by clicking **Delete** if the student never attended your school

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.

If you choose to delete the student's enrollment, if you added the student as an applicant, they will still be marked as Enrolled in the Applicants section.

💡 **Top Tip: If you want to then delete the student from your system before the data retention period expires, take a look at this article.**

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.

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

Students added after completing step 3

If you've already promoted year groups and reg forms, any new students you add on to Arbor won't show up in the 'Tweaks' or Review sections.

Instead, you'll need to go to their Student Profile and add them to the year group and registration form from the Enrolments section. You can see how to do this in this article.

Can't add students to a year group/registration form?

If you have registration forms with students in more than one year group, you might not be able to select students because you need to link the registration form to both year groups. You can see how to resolve this here: Mixed year group registration forms

Step 4 - Custom Groups

The next step is to copy over your Custom Groups for the next academic year.

In the slide over, you can select which groups you would not like to copy over, which groups you would like to copy over with no student enrolments, and which groups you would like to copy over completely, including the students who are enrolled in the group.

Please note that when selecting **Copy Group and Members**:

- Custom groups where students, staff or guardians have been added manually will have the people in the custom group copied over
- Where they've been added using **Automatic Membership Criteria**, the people will not be copied over, and you'll need to add the Automatic Membership Criteria again. This is because Automatic Membership Criteria are based on information for a specific academic year.

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

To enrol students in a custom group manually or using Automatic Membership Criteria, click into a custom group, then click **More**, then follow [these instructions](#). You can also delete a group you've set up incorrectly from here.

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.

5. Houses	Available
6. Courses & Classes	Available
7. Meals	Available
8. Interventions	Available
Review School Year Setup	

5. Houses

Houses setup is available and needs to be marked as complete

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

Houses

Setup 2021/2022

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

Review

Houses (2021/2022)   ⊕ Add

No Houses exist for 2021/2022

In the slide over, select which houses you would like to copy over. Students who are enrolled in a house for the current academic year will be enrolled in the same house in the next academic year. Current house tutors will remain assigned.

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 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 (2020/2021)

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**.

Create House - 2021/2022

Academic Year	2021/2022
House Name*	E.g. 'Seckford'
Short Name	E.g. 'SECK'

Cancel   Save Changes

To edit the student enrolments in the House, or change the staff assigned, click into a House.

House Overview - Acklam (2021/2022)

Name	Acklam	▶
Short name	Acklam	▶
Academic year	2021/2022	▶
Students	177	

Head of House   ⊕ Add

No results found   Head of House

Drag or *click to upload*

Delete House

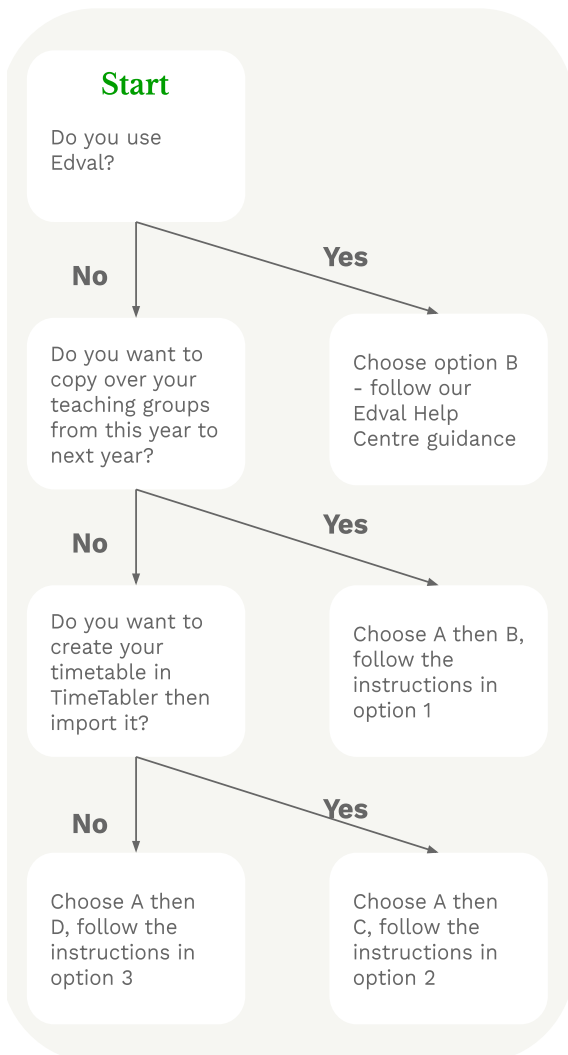**Browse Student Profiles**

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Step 6 - Courses & Classes

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

All schools must complete this step as this step schedules your registration periods when attendance for your registration forms are taken. If you do not complete this step, you will not have any registers in September.

			Complete
5. Houses			
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

Start

Do you use Edval?

No / **Yes**

Do you want to copy over your teaching groups from this year to next year?

Choose option B - follow our Edval Help Centre guidance

No / **Yes**

Do you want to create your timetable in TimeTabler then import it?

Choose A then B, follow the instructions in option 1

No / **Yes**

Choose A then D, follow the instructions in option 3

Choose A then C, follow the instructions in option 2

Which option should we use?

If you use TimeTabler or no timetabling software, to set up your courses and classes you can choose between:

A. Schedule sessions from Registration Forms

B. Setup and promote Courses, Classes, Teaching Groups and Timetable

C. Import Courses & Classes from TimeTabler, and manually enrol students

D. Set up new Courses & Classes from scratch

What do we do if we use Edval?

If you use Edval, follow these instructions - [Steps to take prior to an Edval Import: Importing a timetable for the next Academic Year](#)

Set up registration form registers

This step is the same no matter which option you're using. We recommend scheduling your registration sessions in Arbor rather than in TimeTabler, so the **Registration** column on the [Teacher Hours report](#) can recognise these events correctly.

If you don't have specific registration sessions to take attendance in, you can skip to the section for your specific setup option.

Select A - this will bring you to a list of all the registration forms you have.

Courses & Classes

Setup 2021/2022

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	▶

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**.

Academic Year   2021/2022 ▼

Registration Forms in 2021/2022

☐ ✎ Registration Form ▲	Year Group(s)	Status
☑ Schedule Registration Forms	Year 10 (2021/2022)	Not Timetabled
☑ Form 10KV (2021/2022)	Year 10 (2021/2022)	Not Timetabled

A slide-over will appear where you enter the start and end times for the Registration Forms you have selected. Make sure your registration times overlap your [Roll Call times](#).

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

When you return to the **Courses & Classes** page you will now see a list of all the scheduled Registration Forms.

We recommend this option for schools that use teaching groups and have complex timetable requirements, large numbers of students or a large choice of courses. Click into option B.

Courses & Classes

Setup 2021/2022

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. Setup and promote Courses, Classes, Teaching Groups and Timetable	Optional	▶

You'll be taken to an 8-step workflow to copy classes over to next year.

« Back	**Setup for Courses, Classes and Timetable**	
Steps to complete		
1. Copy Teaching Groups		Available
2. Copy Courses		Available
3. Import Timetable		Locked
4. Automatic Enrolments		Locked
5. Promote Teaching Group Enrolments		Locked
6. Manual Teaching Group Enrolments		Locked
7. Promote Course Enrolments		Locked
8. Manual Course Enrolments		Locked

Option 1 - Setup and promote Courses, Classes, Teaching Groups and Timetable

We recommend this option for schools that use teaching groups and have complex timetable requirements, large numbers of students or a large choice of courses. Click into option B.

Courses & Classes

Setup 2021/2022

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. Setup and promote Courses, Classes, Teaching Groups and Timetable	Optional	▶

You'll be taken to an 8-step workflow to copy classes over to next year. You will need to either:

- Complete steps 1 to 8 in order, to copy courses and classes from the previous academic year, then import your timetable, then promote your students - this will copy the course structure from the previous academic year.
- Skip steps 1 and 2 and move straight to step 3 to import a brand new timetable for that academic year - this will create a new course structure in Arbor from the information in the imported TimeTabler file.

We recommend the second option, as although it takes longer to promote the students, any subsequent imports or changes you do will be quicker. You can then continue from step 4 to promote student enrolments from their classes this year into next year.

« Back	Setup for Courses, Classes and Timetable	
Steps to complete		
1. Copy Teaching Groups		Available
2. Copy Courses		Available
3. Import Timetable		Locked
4. Automatic Enrolments		Locked
5. Promote Teaching Group Enrolments		Locked
6. Manual Teaching Group Enrolments		Locked
7. Promote Course Enrolments		Locked
8. Manual Course Enrolments		Locked

Step 1 (optional) - Copy Teaching Groups

This step allows you to copy just the group names and attributes (such as description and linked teachers) from this academic year into the next academic year. No students will be enrolled yet during this step - students will be promoted into your teaching groups in a later step.

Tick the box next to all the teaching groups you want to copy over to the next academic year, then click the blue pencil icon to select **Bulk copy Teaching Groups to next academic year**.

	Teaching Group 2020/2021	▲	Group copied to 2021/2022
☐ ✎			
☐	Bulk copy Teaching Groups to next academic year		✖
☑	Bulk delete copied Teaching Groups from next academic year		✖
☑	Y7Set2		✖

The teaching groups you've copied over will then have a tick next to them. This means the group and the academic lead assigned will be copied over.

	Teaching Group 2020/2021	▲	Group copied to 2021/2022
☐ ✎			
☐	Y10 Triple Science		✔
☐	Y7Set1		✔

To delete any teaching groups from next year that you didn't want to copy over, tick the box next to all the teaching groups you want to not copy over to the next academic year, then click the blue pencil icon to select **Bulk delete copied Teaching Groups from next academic year**.

Please note, this will only work if you have not yet enrolled students into the teaching group. If you've already completed steps 5 or 6 to enrol students into the teaching group, you won't be able to delete the teaching group from here. You'd need to do this instead by clicking into the teaching group in step 6 and deleting it from there.

	Teaching Group 2020/2021	▲	Group copied to 2021/2022
☐ ✎			
☑	Bulk copy Teaching Groups to next academic year		✔
☐	Bulk delete copied Teaching Groups from next academic year		✔

Once you have completed any bulk copying, mark this step as complete using the green button.

✔ Mark as complete

Copy Teaching Groups setup steps are optional. Once you have reviewed Copy Teaching Groups, click Mark as complete to complete setup or click Skip for now to review later

Once you have marked this step as complete, you can always make further changes to teaching groups by going to the teaching groups area or by marking the step as incomplete again.

Step 2 (optional) - Copy Courses

This step allows you to copy just the Courses and attributes (such as description and subject) from this academic year into the next academic year. No students will be enrolled yet during this step - students will be promoted into your courses in a later step.

In this example, we're going to look at copying over this Art and Design subject. Here you can see that KS3 Art is the top-level course, under that you have Year 7 and then within year 7, you have two modules.

Tick the box next to all the courses you want to copy over to the next academic year, then click the blue pencil icon to select **Bulk copy Courses to next academic year**.

The courses you've copied over will then have a tick next to them. This means the group and the academic lead assigned will be copied over. Notice that copying over the bottom-level courses also copies the courses that these modules are a part of.

To delete any courses from next year that you didn't want to copy over, tick the box next to all the courses you want to not copy over to the next academic year, then click the blue pencil icon to select **Bulk delete copied Courses from next academic year**.

Please note, this will only work if you have not yet enrolled students in the course.

If you've already completed steps 5 or 6 to enrol students into the teaching group, you won't be able to delete the teaching group from here.

☐ ✏	Course 2020/2021 ▲	Year Group	Subject	Group copied to 2021/2...
☐	**Bulk copy Courses to next academic year**			✖
☐	**Bulk delete copied Courses from next academic year**	Year 10		✖
☐	Covid bubble class: Bubble group 2	Year 11		✖
☐	KS3 Art		Art and Design / Art	✔
☐	KS3 Art: Year 7	Year 7	Art and Design / Art	✔
☑	KS3 Art: Year 7: 7Ar/1	Year 7	Art and Design / Art	✔

Notice that if you only delete the bottom-level courses, the parent courses will remain. Be sure to delete all the courses from the structure that you don't want to copy over.

☐ ✏	Course 2020/2021 ▲	Year Group	Subject	Group copied to 2021/2...
☐	Covid bubble class			✖
☐	Covid bubble class: Bubble group 1	Year 10		✖
☐	Covid bubble class: Bubble group 2	Year 11		✖
☐	KS3 Art		Art and Design / Art	✔
☐	KS3 Art: Year 7	Year 7	Art and Design / Art	✔
☐	KS3 Art: Year 7: 7Ar/1	Year 7	Art and Design / Art	✖
☐	KS3 Art: Year 7: 7Ar/2	Year 7	Art and Design / Art	✔

Once you have completed any bulk copying, mark this step as complete using the green button.

✔ **Mark as complete**

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

Once you have marked this step as complete, you can always make further changes by marking the step as incomplete again.

You can also add additional courses to next year by clicking on the review section.

Review

Make further changes to Courses ▶

Step 3 - Import Timetable

This step is for importing your timetable from TimeTabler. If you don't use TimeTabler you'll need to timetable your sessions manually. You can mark this step as skipped, then take a look at how to do this in the Scheduling your lessons manually if you didn't import from TimeTabler section.

To import from TimeTabler, click **+Add** to upload your file. Follow the instructions in the **Importing your TimeTabler** file section of this article to import your timetable: Importing a timetable from TimeTabler

💡 **Top Tip: Want to make everything run as fast as possible? Wait until you've completed all the other steps and schedule your timetable slots as your last step.**

Step 4 - Automatic Enrolments

This step allows you to copy over the automatic enrolments that you had for Teaching Groups this academic year into the next academic year. The table will give you suggestions of the teaching group, and a class it thinks you would like to create an automatic enrollment into, so any student added to the teaching group can be automatically enrolled in the class.

Tick the box next to all the automatic enrolments you want to set up, then click the blue pencil icon to select **Bulk copy Course and Teaching Group mappings to the next academic year**.

The automatic enrolments you've set up will then have a tick next to them.

To remove any automatic enrolments set up in error, tick the box next to all the teaching groups you want to not copy over to the next academic year, then click the blue pencil icon to select **Bulk delete copied Course and Teaching Group mappings from the next academic year**.

To add any more automatic enrolments for next year, just click **+Add**.

Once you have completed any bulk copying, mark this step as complete using the green button.

Step 5 - Promote Teaching Group Enrolments

In the middle column, you'll see the teaching group you've copied over to next year. In the left-hand column, pick the Teaching Group from this year that you want to move into the teaching group for next year. For example, moving students from a Year 7 teaching group into the Year 8 teaching group for next year.

If you don't see all the teaching groups you want to copy over, you can always return to one of the previous steps.

Once you've chosen all the teaching groups, click the green **Save** button. **Be sure you are ready to save as you can't make any further changes to the groups you've copied over from here once you do.** Notice how I don't have teaching groups for year 7 - I'll need to set these up in the next step.

Save 2021/2022 Enrolments

Promote Students From Teaching Group 2020/2021	Promote Students into Teaching Group 2021/2022 ▲	Promoted to 2021/2022	
Do not promote	Y10 Triple Science (2021/2022)	✖	🗑
Do not promote	Y7Set1 (2021/2022)	✖	🗑
Do not promote	Y7Set2 (2021/2022)	✖	🗑
Y7Set1	Y8Set1 (2021/2022)	✖	🗑
Y7Set2	Y8Set2 (2021/2022)	✖	🗑
Y8Set1	Y9Set1 (2021/2022)	✖	🗑
Y8Set2	Y9Set2 (2021/2022)	✖	🗑

Save 2020/2021 Enrolments

Promote Students From Teaching Group 2019/...	Promote Students into Teaching Group 2020/2...▼	Promoted to 2020/20...	
Y8Set2	Y9Set2 (2020/2021)	✖	🗑
Y8Set1	Y9Set1 (2020/2021)	✖	🗑
Y7Set2	Y8Set2 (2020/2021)	✖	🗑
Y7Set1	Y8Set1 (2020/2021)	✖	🗑
	Y7Set2 (2020/2021)	✖	🗑
	Y7Set1 (2020/2021)	✖	🗑
Y10Set2	Y11Set2 (2020/2021)	✖	🗑
Y10Set1	Y11Set1 (2020/2021)	✖	🗑
Y9Set2	Y10Set2 (2020/2021)	✖	🗑
Y9Set1	Y10Set1 (2020/2021)	✖	🗑

🛈 This process will be run in the background, please check back later. ✖

Once the teaching group enrolments have copied over, the table will show ticks next to these teaching groups.

| Promote Students From Teaching Group 2020/2021	Promote Students into Teaching Group 2021/2022 ▲	Promoted to 2021/2022	
	Y10 Triple Science (2021/2022)	✖	🗑
	Y7Set1 (2021/2022)	✖	🗑
	Y7Set2 (2021/2022)	✖	🗑
Y7Set1	Y8Set1 (2021/2022)	✔	🗑
Y7Set2	Y8Set2 (2021/2022)	✔	🗑
Y8Set1	Y9Set1 (2021/2022)	✔	🗑
Y8Set2	Y9Set2 (2021/2022)	✔	🗑

You can then mark this step as complete using the green button.
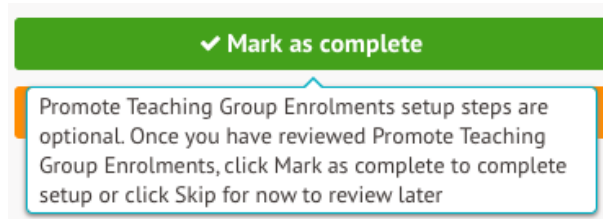
Step 6 - Manual Teaching Group Enrolments

If you want to manually enrol students into teaching groups you can use this step - it's perfect for adding your Year 7 students into their new teaching groups.
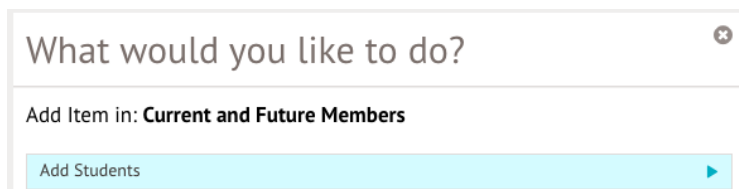
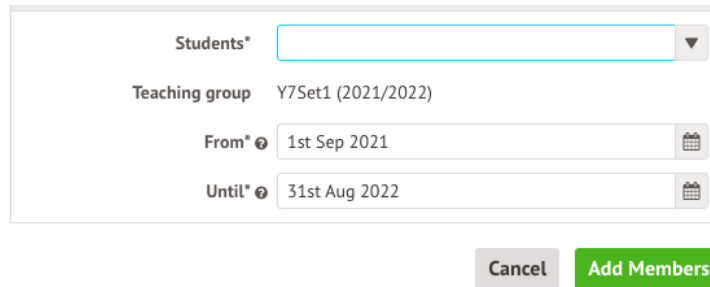Just click the teaching group, then click the **More information** button.
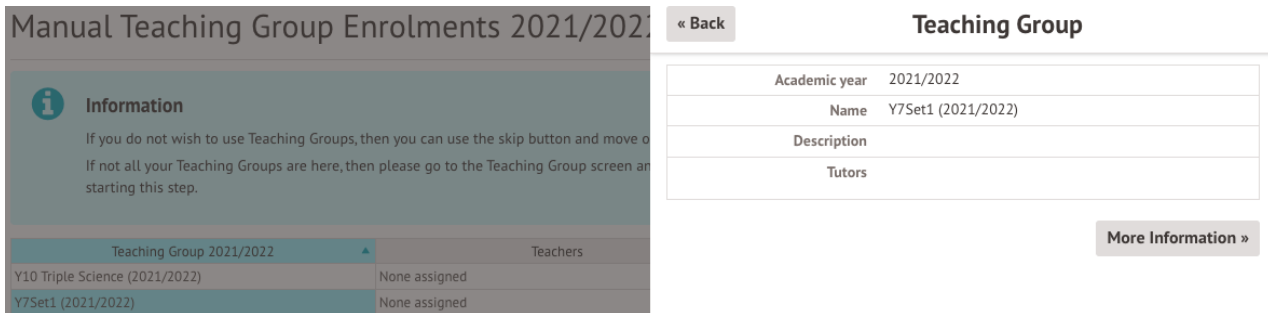
In the teaching group overview, click **+Add** in the **Current and Future Members** section.

Choose to add students, select the students then add them as members.

You can then return to **School > School Structure > School Year Setup > 6. Courses & Classes > B. Setup Courses, Classes & Timetable > 6. Manual Teaching Group Enrolments** to mark this step as complete using the green button.
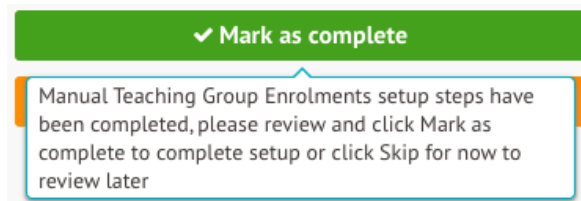
Step 7 - Promote Course Enrolments

In the second column, you'll see the course you've copied over to next year. In the left-hand column, pick the bottom-level course from this year that you want to move into the course for next year. For example, moving students from a Year 7 maths class into the Year 8 maths class for next year.

If you don't see all the courses you want to copy over, you can always return to step 2 and copy them over there.

You may notice a link symbol in the middle column. This means there's an automatic enrollment set up into that class, meaning you might not need to promote students.

In the example below, as my Year 8 Set 1 class for 2020/2021 is automatically enrolled into Art, and Year 7 Set 1 has been promoted into Year 8 Set 1 already, I won't need to choose to promote the Year 7 class into the Year 8 one.

KS3 Art						
KS3 Art: Year 7						
KS3 Art: Year 7: 7Ar/1						
KS3 Art: Year 7: 7Ar/2						
KS3 Art: Year 8						
KS3 Art: Year 8: 8Ar/1						
KS3 Art: Year 8: 8Ar/2						
KS3 Art: Year 9						
KS3 Art: Year 9: 9Ar/1						

efully: the promotion of students into courses cannot be undone or changed in

Save 2021/2022 Enrolments

	Course 2..▲		Year Group 20...	Start Date	End Date	Pro...	
							🗑
	...022)		Year 7 (2021/2...				🗑
	KS3 Art: Year 7: 7Ar/2 (2021/2022)		Year 7 (2021/2...	01/09/2021	31/08/2022	✖	🗑
	KS3 Art: Year 8 (2021/2022)		Year 8 (2021/2...				🗑
	KS3 Art: Year 8: 8Ar/1 (2021/2022)	🔗	Year 8 (2021/2...	01/09/2021	31/08/2022	✖	🗑
	KS3 Art: Year 8: 8Ar/2 (2021/2022)	🔗	Year 8 (2021/2...	01/09/2021	31/08/2022	✖	🗑

Once you've chosen all the classes, click the green **Save** button. **Be sure you are ready to save as you can't make any further changes to the groups you've copied over from here once you do.** Notice how I don't have classes for year 7 - I'll need to set these up in the next step.

ℹ This process will be run in the background, please check back later. ⊗

Once the teaching group enrolments have copied over, the table will show ticks next to these teaching groups.

	KS3 Art: Year 8: 8Ar/1 (2021/2022)	🔗	Year 8 (2021/2...	01/09/2021	31/08/2022	✖	🗑
	KS3 Art: Year 8: 8Ar/2 (2021/2022)	🔗	Year 8 (2021/2...	01/09/2021	31/08/2022	✖	🗑
	KS3 Art: Year 9 (2021/2022)		Year 9 (2021/2...				🗑
KS3 Art: Year 8: 8Ar/1	KS3 Art: Year 9: 9Ar/1 (2021/2022)		Year 9 (2021/2...	01/09/2021	31/08/2022	✔	🗑
KS3 Art: Year 8: 8Ar/2	KS3 Art: Year 9: 9Ar/2 (2021/2022)		Year 9 (2021/2...	01/09/2021	31/08/2022	✔	🗑

You can then mark this step as complete using the green button.

✔ **Mark as complete**

Promote Course Enrolments setup steps are optional. Once you have reviewed Promote Course Enrolments, click Mark as complete to complete setup or click Skip for now to review later

Step 8 - Manual Course Enrolments

If you haven't set up automatic enrolments during step 4 and want to enrol students into courses you can use this step. Just click the course, then click the **Enrol Students** button.

In the slide over, select the students then enrol them.

You can then mark this step as complete using the green button.

All your steps on the overview page should now be marked as complete (or skipped if you haven't imported a timetable from TimeTabler).

Scheduling your lessons manually if you didn't import from TimeTabler

If you haven't completed step 3 and imported a timetable from TimeTabler, your courses will show that they don't have lessons within the main new school year setup.

You'll need to click into each course and schedule lessons in the Classes & Lessons section.

Classes & Lessons ⊕ Add

No lessons scheduled

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 2021
End date*	31st Aug 2022
Location	
Staff member	Usually leave this blank to use Academic Leads

Cancel   **Save Changes**

Classes & Lessons ⊕ Add

Friday: 09:00 - 10:00
Effective Dates: 01 Sep 2021 - 31 Aug 2022

Scheduling In Progress ▶

Once you've added lesson slots for all your courses, they won't have any red text against them and you've finished this step.

Review Courses & Classes (2021/2022) ⊕ Add

— KS3 Art	▶
— Year 7	▶
7Ar/2	▶

Option 2 - Import from TimeTabler, and manually enroll students

We recommend this option for schools with complex timetable requirements, large numbers of students or a large choice of courses, but who don't want to copy over their teaching groups. To be able to use this option, you must first have generated a timetable file in TimeTabler to be imported into Arbor.

Importing your timetable

Click on option C to be taken to the Import Timetable page.

Follow the instructions in the **Importing your TimeTabler** file section of this article to import your timetable: Importing a timetable from TimeTabler

Enrolling your students

The next step is to enrol your students into this class, so they will appear on the registers.

We recommend using our bulk enrolment page by going to **Students > Enrolment > Courses > Bulk Enrolment**. You can see how to enrol students into their registers from here following this guide: <u>Bulk enrol students into lesson registers</u>

Option 3 - Schedule from Registration Forms, then add classes manually

We recommend this option for schools that don't use TimeTabler and don't want to copy over teaching groups, or who don't use teaching groups at all.
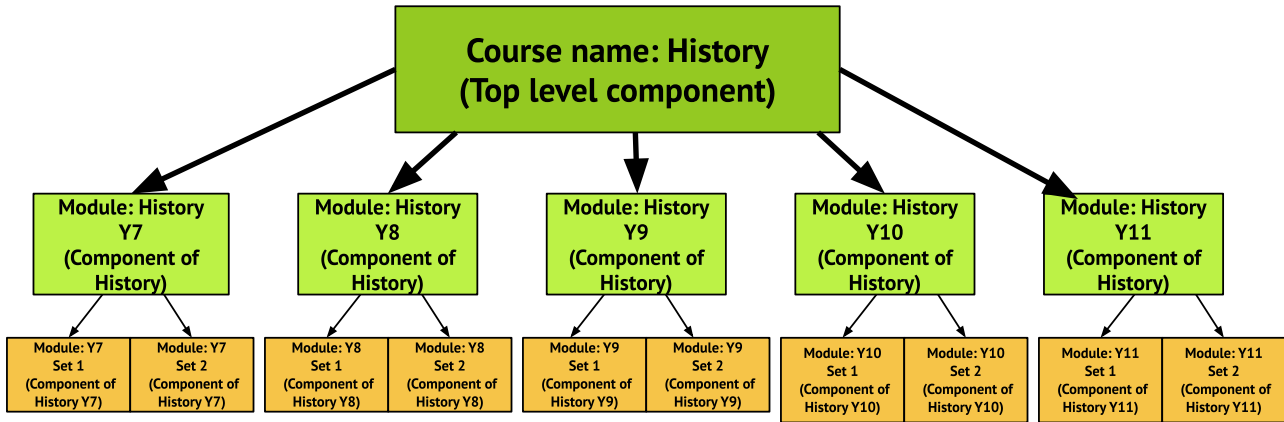
Setup your courses and classes

Once you've scheduled your registration sessions, you'll need to set up your other 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

You will also need to have a plan for how you intend to structure your courses and classes. There are a variety of models that can be applied when setting up courses from scratch, the key is determining which one is suitable for your school structure before you start to add them.

Model 1 (shown below), is popular for the majority of mainstream secondary schools.

This is how it would then look on the New School Year Setup page:

Model 2 (shown below) has the Subject as the top course component and the individual classes directly underneath. In this case, you would just skip the middle step of the setup outlined below, and label the sub-modules themselves with the correct year group.
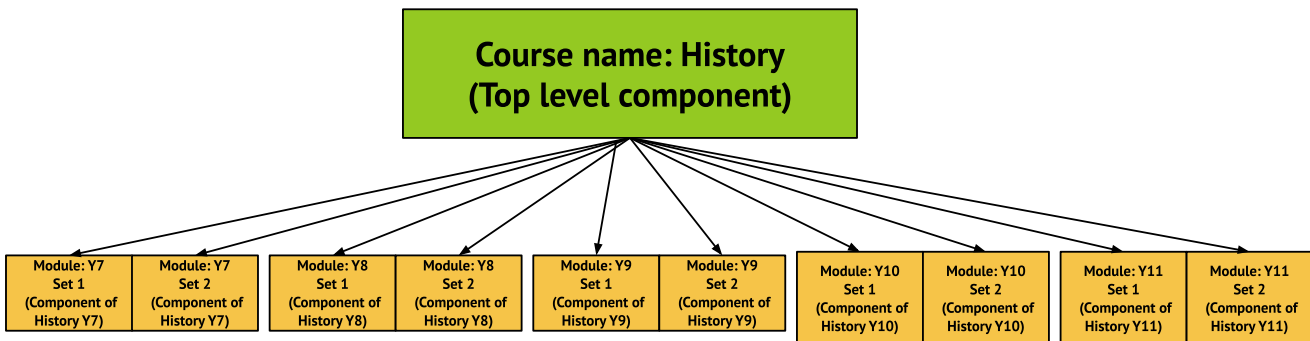
This is how it would look in Arbor:

Choose option **D. 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.

This creates the course (the top-level component). The next step is to set up class groups if not all of your students will be in this lesson at the same time.

To do this, from the Course Overview, click **+Add** in the **Modules** section.

In the slide over add the name of the module and fill in the other details. Select the year group then click the green **Add Module** button.

You will be taken to the module overview. You will then need to add a sub-module within this module by again clicking **+Add** in the **Modules** section.

In the slide over add the name of the module and fill in the other details. Then click the green **Add Module** button.

Add New Module

Module name*	History Y7 Set 1
Abbreviation	
Department	▼
Academic Lead	Bethany Edwards ⊗ ▼
Subject	History ⊗ ▼
Year group	Year 7 (2021/2022) ⊗ ▼

Cancel **Add Module**

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

Classes & Lessons   ⊕ Add

No lessons scheduled

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.

Enrolling your students

The next step is to enrol your students into this class, so they will appear on the registers.

We recommend using our bulk enrolment page by going to **Students > Enrolment > Courses > Bulk Enrolment**. You can see how to enrol students into their registers from here following this guide: [Bulk enrol students into lesson registers](#)

You must repeat this process for each class.

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
	2021/2022	01 Sep 2021 - 31 Aug 2022	▶

In the example below, the first day of the term is the 1st. However, as I have put the 1st, 2nd and 3rd as inset days, the first day I need to take attendance is the 6th of September.

Holidays (2021/2022)			
Summer	01 Sep 2021 - 03 Sep 2021		*Vacation*
Autumn half term	25 Oct 2021 - 29 Oct 2021		*Half-Term*

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

7th Sep 2020	🗓		**Change Date**

If you've set up your registrations correctly, they should appear on this page! 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.

Step 7 - Meals

Meals setup is another optional step. If you don't use Meals in Arbor do not enter any information into this section and click on the green **Mark as Complete** button.

You will see there are 4 parts to setting your Meals up successfully.

1. Copy Meals and Meal Provisions	Incomplete	▶
2. Copy Meal Sittings and Attendees	Incomplete	
3. Copy Meal Prices	Incomplete	
4. Copy Meal Choices	Optional	

Copy Meals and Meal Provisions

Click on **Copy Meals and Meal Provisions**. A slide over will appear containing a list of the Meals and Meal Provisions for the next year. Tick the ones you would like to copy to next year, and untick the ones that should not be copied. **For any provision that is ticked, the meal it belongs to will automatically be copied over.**

When you are happy you have selected the meals you want to copy over click on the green **Copy** button at the bottom of the slide-over.

Lunch

Meal provisions
- ☑ Absent
- ☑ Cold Lunch
- ☑ Hot Lunch
- ☑ Packed Lunch

Cancel   Copy

You can set up meals from this page, either by clicking into the **Make further changes to meals section** if you already have other meals or by clicking to create a meal if you have not used Meals before. The process to set a meal up through New School Year Setup is similar to the standard process, shown here: Setting Up Meals

Copy Meal Sittings and Attendees

Click on step 2. Tick the meal sittings and attendees you would like to copy and untick the ones that should not be copied. **If you do not copy the sitting timetable or at least one sitting attendee group, the sitting itself will not be copied.**

We recommend copying over your attendees to make sure teachers can access the Meal Register for their classes.

Copy Meal Prices

Click on Step 3. Tick the prices you would like to keep and untick the ones you would like to discard. The current price is shown in brackets, but this can be changed later.

Copy Meal Choices

Step 4 is optional and will depend on whether you want meal registers to be pre-filled with student's regular meal choices. If you do, click **Copy Meal Choices**.

Why have Meal Choices not copied over?

For meal choices to copy over for students, the meal choice needs to have an end date that is the same as or later than the last day of Summer term for your school.

You'll need to make sure that the Summer Term in your academic calendar lasts until your last good school day, not until the end of the summer holidays. In the example below, meal choices that end on the 30th August would not be copied over.

Check you'll have meal registers in September

You'll need to make sure you've set up meals correctly to ensure you'll be able to select student's meal choices in the Meal Registers. If you have not yet set your attendees for meals, your meal register will be blank.

To fix this, go to **School > Meals > Setup**. Select the next academic year from the drop-down menu.

Click into **Attendees** and go to the **Automatic Group Attendees** tab. Click **+Add** to add students.

Select all the registration forms to add to the meal, then click **Add Automatic Attendees**.

This will then generate your meal registers. You can add meal choices for your students from here.

If you want to set a regular meal choice that students will have every day, you can go to **School > Meals > Setup > Meal Choices & Dietary Requirements > Students without a Meal Choice**. You can then assign them a meal choice individually or in bulk.

Step 8 - Interventions

If you are not using the Interventions module or will not be running the same interventions groups in the next academic year then just click on the green 'Mark as complete' button.

To copy over the interventions click on **1. Copy interventions**.

Tick the interventions you would like to copy over to next year, and then click **Copy Interventions**.

Click into an intervention to visit the overview.

You'll need to then complete the intervention setup to create intervention groups, add students and schedule intervention sessions. You can see how to do this here: [Setting up a new intervention](#)

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**.

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. Use our **New School Year Setup Checklist**, available on the Help Centre here.

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, such as the enrolments.

Review School Year Setup

2021/2022 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	▶

« Back   **Review Enrolments**

Review Enrolments (2021/2022)

Student	Year Group ▼	Registration Form	House
Fox Carlie	Year 13 (2021/2022)	Form 13IP (2021/2022)	Westbourne (2021/2022)
Jones Joanne	Year 13 (2021/2022)	Form 13IP (2021/2022)	Westbourne (2021/2022)
Lewis Joanne	Year 13 (2021/2022)		Westbourne (2021/2022)
Marshall Zach	Year 13 (2021/2022)	Form 9SN (2021/2022)	Westbourne (2021/2022)
Wilson Layla	Year 13 (2021/2022)	Form 9WD (2021/2022)	Westbourne (2021/2022)
Carter Elliott	Year 13 (2021/2022)	Form 10CU (2021/2022)	Ladbroke (2021/2022)
Chapman Francesca	Year 13 (2021/2022)	Form 10KV (2021/2022)	Ladbroke (2021/2022)

You can also review your Year Groups and Registration Forms.

Year 8 (2021/2022)   52 students, promoted from Year 7
                      Head of Year: Barry Wilkinson
                      Registration Forms
                      Form 8HV (2021/2022): 26 students, promoted from Form 7BG
                      Tutor : Abigail Knight
                      Form 8LR (2021/2022): 26 students, promoted from Form 7GF
                      Tutor : Barry Wilkinson

If you need to add any new year groups or registration forms, just click **+Add**.

What would you like to do?

Add Item in: **2021/2022 Year Groups and Registration Forms**

Add year group to 2021/2022   ▶

Add registration form to 2021/2022   ▶

Clicking on a Year Group will allow you to see all the students enrolled in it, or you can click **More Information** to view and edit the setup of your year group further.

« Back   **Year Group Year 8 (2021/2022)**

Year Group Details

Name   Year 8 (2021/2022)

Head of Year Barry Wilkinson

More Information »

Students (52)

Anderson Dennis

Bennett Leanne

For example, you can click on the registration form to access that page and edit it, such as if you want to edit the name.

Year group name   Year 8   ▶
Short name   Year 8   ▶
Academic year   2021/2022   ▶
Curriculum grade   Year 8   ▶
Target enrolment   Not specified   ▶
Students   52

Registration Forms

Form 8HV (2021/2022)   ▶
Form 8LR (2021/2022)   ▶

Other things to prepare

Assessments

If you use assessments in Arbor, you'll need to copy your assessments across to next year. They will not automatically copy over. To see how to do this, follow the instructions in this article: Copying Assessments to the coming year

Data Collections

Data Collection Policies are linked to the Assessment policy. Because you need to select the assessments to create or copy over each year, you also need to define your Data Collection Policies each year if you use them at your school. You can see how to add Data Collections here.

Behaviour

When the new school year begins, you'll need to set up certain areas of behaviour.

Don't worry, you won't need to set everything up. To prepare for September, you'll just need to set up detentions and add your Internal exclusion types. You can see how to do this in this article: Setting up Behaviour in Arbor

My Classroom

If your school uses My Classroom, there are certain steps that need to be completed each year for you to be able to use it.

You can use layouts from past years as these are linked to the room, but you will need to set up seating plans each year as there will be different students in your classes. You can see how to do this here.

Because teachers can access My Classroom at any time for their lessons, once you've completed Step 6 of the New School Year Setup process to schedule your classes, your teachers will be able to set up their seating plans before students return in September.

School Shop

If you use the School Shop on your site, the products will remain active, and available to the students who were in the student groups selected last year. To make the items available to new students, or different student groups, you'll need to add the new students groups, then add prices for them: School Shop

Timetable periods

Timetable periods can be used to help align your attendance marks into set groups. If you want to use this feature again next year you'll need to set them up for next year by following the instructions in this article. Remember to change the academic year to next year from the drop-down menu.

Programmes of Study

Ending student enrolment into your schools during Step 2, or changing enrolment into courses in step 6 of the New School Year Setup won't update Programmes of Study for your Post-16 students. Make sure any changes you make to course enrolments are reflected in Programmes of Study following this guidance.

Shared Teaching

If you use Edval or TimeTabler:

1. Build your timetable as normal.
2. Create your Shared Teaching courses (without timetable slots) in the Shared Teaching area.
3. Complete the New School Year setup process on each school site to copy over/promote courses and classes.
4. Import your timetable as normal, mapping to the existing courses in Arbor. The import process will ignore any timetable slots connected to Shared Teaching courses.
5. Add in the Shared Teaching timetable slots in Shared Teaching

If you do not use Edval or TimeTabler, set up or copy over your courses through the New School Year setup area but exclude any Shared Teaching courses from your setup. You'll then need to create your Shared Teaching course in Shared Teaching

Additional resources

You can get support from us in-app! Just click on the **Chat** bubble in the bottom left of your site. Take a look at how to get the most out of our chat functionality here: Using Webchat

For more support, including how to sign up for our upcoming webinars or book in a 15-minute session with our expert Support Team, check out our New School Year Setup help and guidance.

We've also got articles and videos on our Help Centre. Click **Help Centre** in your Arbor site and search, or go to this link: New School Year Setup