ONE IT
SERVICES & SOLUTIONS

Arbor – Custom Report Writer

How to create custom reports

Arbor
Accredited Partner

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01| Introduction

Arbor's Custom Report Writer can be used to create your own reports and this guide will walk you through creating one of these reports step-by-step.

If you have any queries or need some extra support, please don't hesitate to get in touch with the MIS Team on the below contact details or by logging a ticket in the Helpdesk.

01642 635570

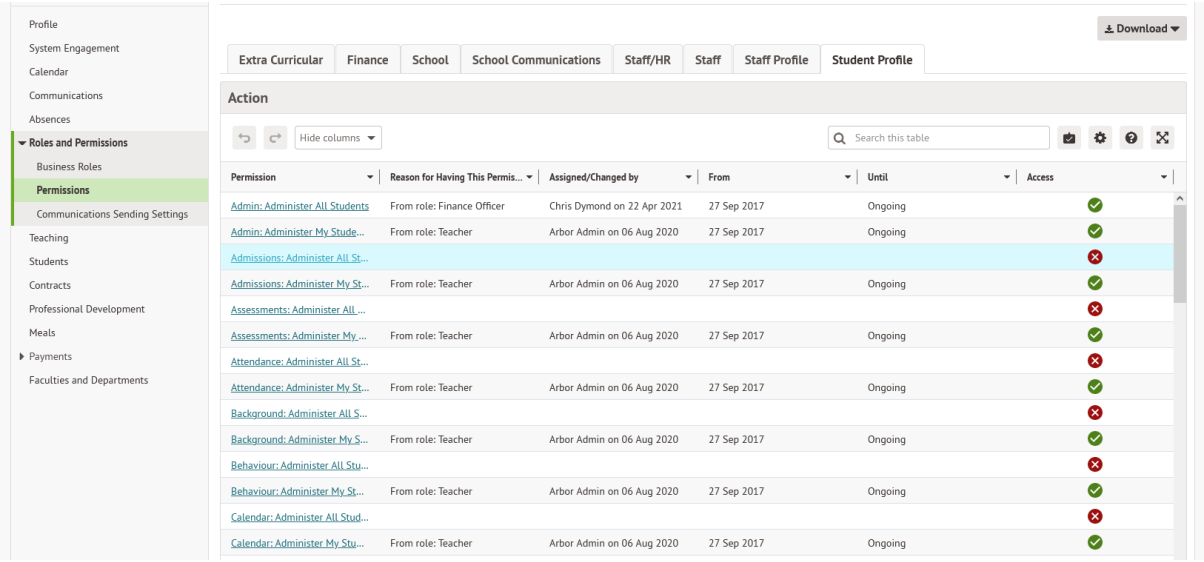
helpdesk@oneitss.org.uk

02| Checking Permissions

To access Custom Report Writer, you will need to ensure you have the correct permission.

You will need the **School: General Admin: Export Data permission.** In addition to this, to report on any area in Arbor, you will need to make sure you have access to that information in the first place.

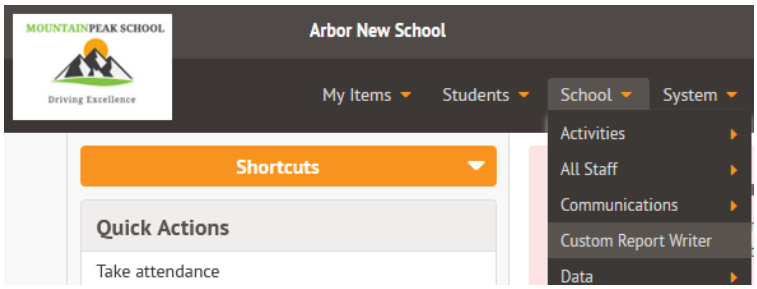
To check permissions, you/your admin team/SLT will need to go to the staff profile, then browse to the **Roles and Permissions** section on the left, then **Permissions**. This section is split into tabs depending on what information you are looking for.



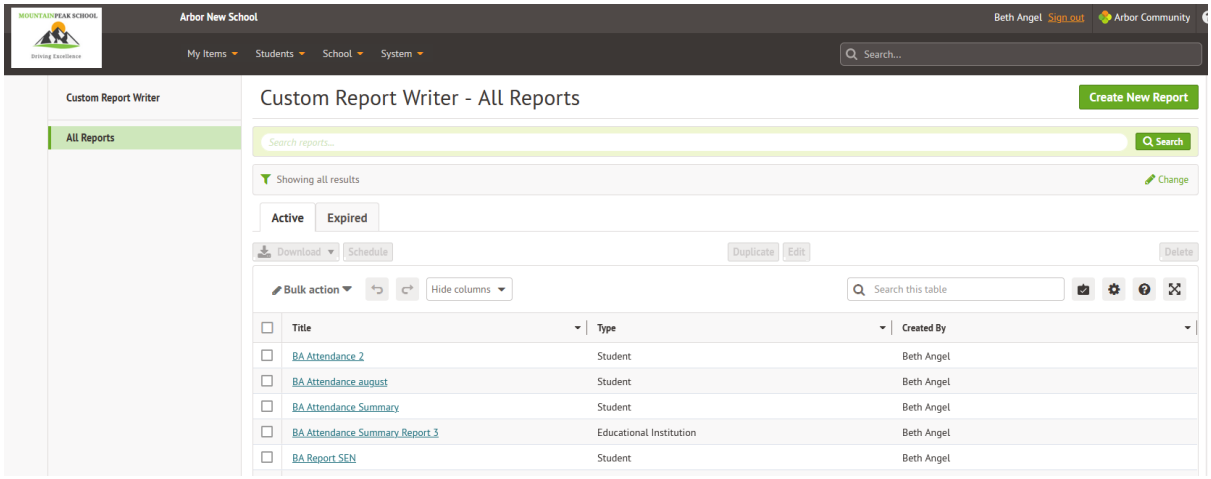
03| Accessing Custom Report Writer

Custom Report Writer can be found under the following menu route:-

School | Custom Report Writer

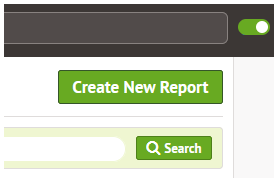


The first screen will show you a list of reports that you have already created. This may be blank if it's your first time using this area of Arbor.

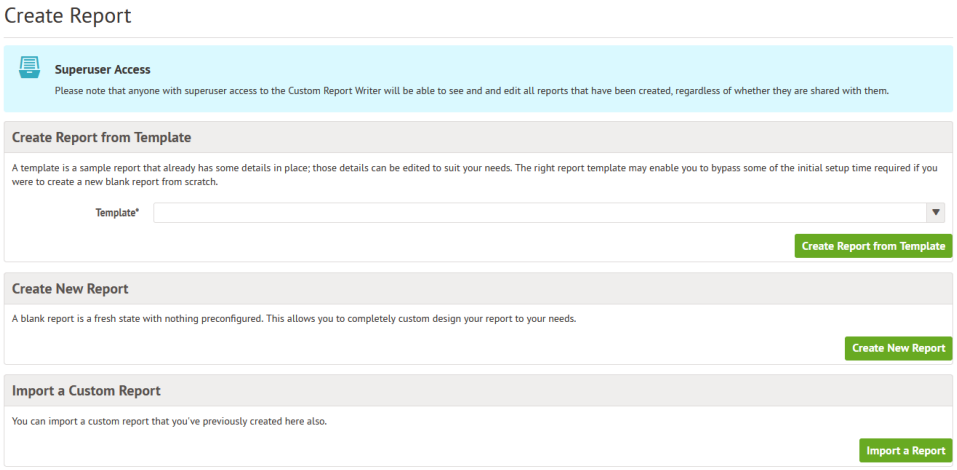


04| Creating a Custom Report

1. To create a brand new report, click on **Create New Report** in the top right corner.

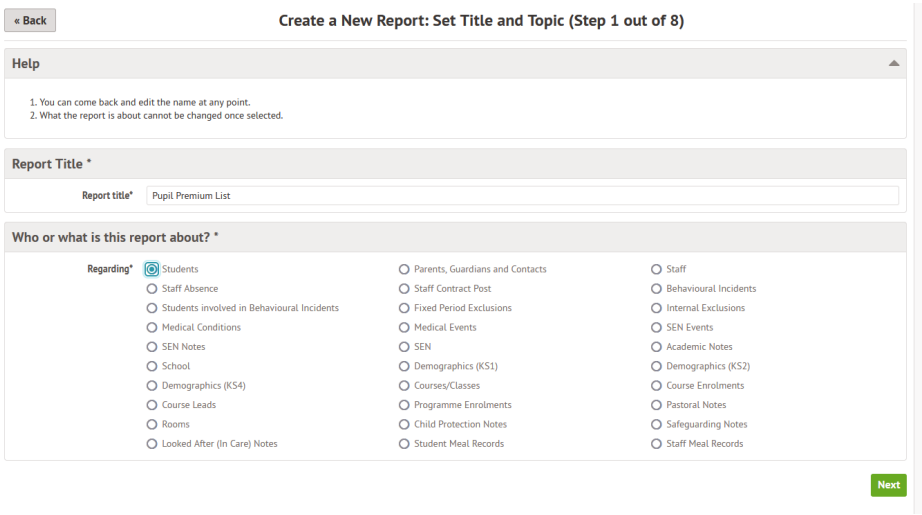


2. You will then get 3 options:-



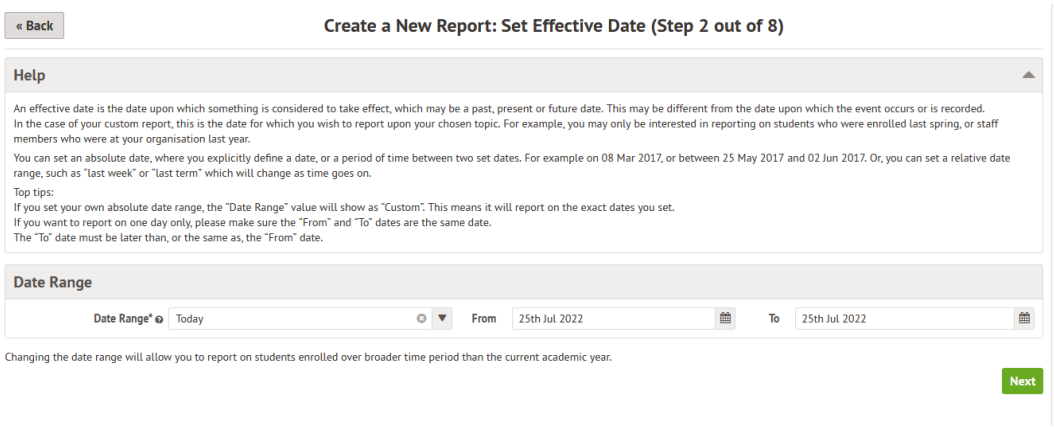
3. In this instance, we are going to choose **Create New Report** as we want to start from scratch.

4. You will then be asked for a Report Title and who/what the report is about. For this example we are going to create a Pupil Premium list with a few extra columns so we have chosen Students in the Regarding field.



5. Click **Next**

6. You will then be asked for a date range. This date range changes who is included in the report. If you would like to include leavers, choose "Current Academic Year". If you only want to include students on roll at the time you run this report, choose "Today". This date range is a *relative* date range, meaning that whenever you run this report, it will use the current date.



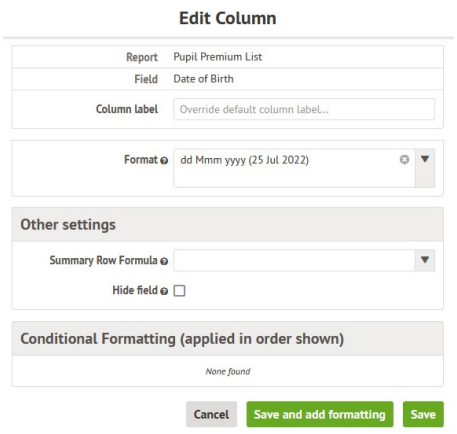
7. Click **Next**

8. This is where we choose our columns. On the left, you will see a search field and a list of available columns. On the right, you will see the Added Columns section. As default, Name with always be in the Added Columns section.

9. To add a column, you simply drag and drop from the left section to the right. You can also drag your Added Columns around to re-order them as needed.

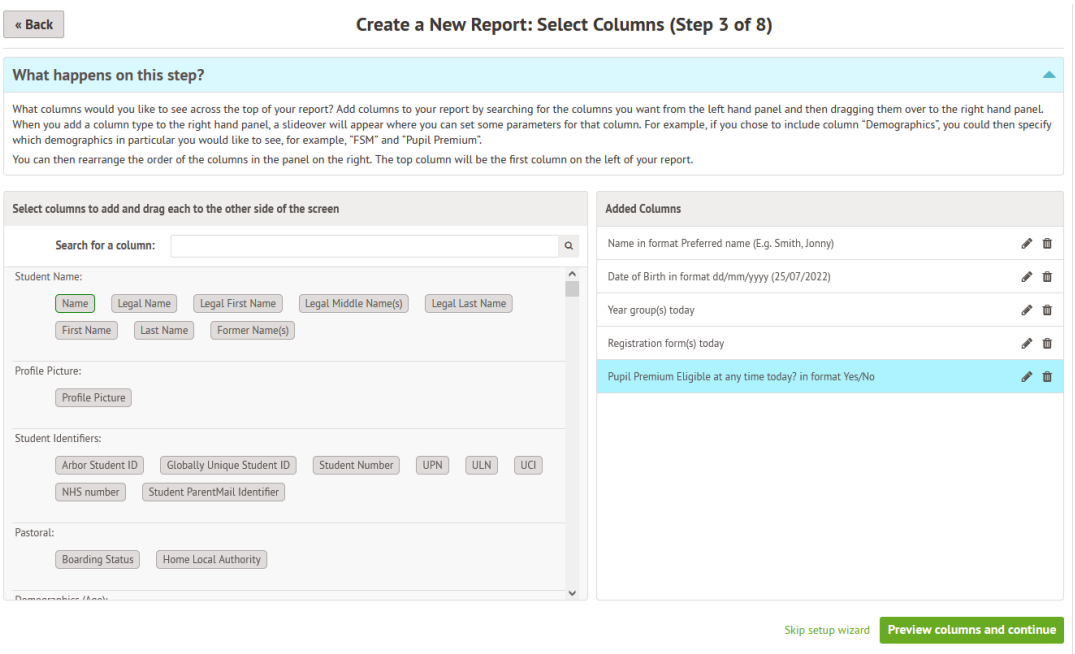
10. When adding columns, you will see a slide-over which will ask you for some extra options. For example, I have added Date of Birth as an extra column and get options as shown to the right.

    I can change the format or add conditional formatting. For now, we are going to keep it simple and just format the date in **DD/MM/YYYY** format. Once you've configured your column options, click **Save** to add the column.



11. I have chosen to include the following columns in my report:-
    - Name
    - Date of Birth
    - Year Group
    - Registration Form
    - Pupil Premium Eligible (in format Yes/No)

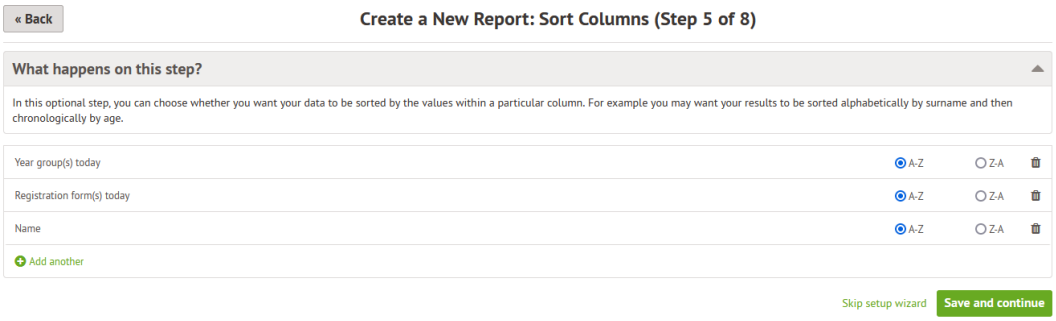
    My screen now looks like this:-



12. Click **Preview columns and continue**

13. You will get another chance to reorder the columns if needs be. If you're happy, click **Continue to column sorting**

14. It will order your columns by name A-Z as default but you can use the **Add another** button to sort by year/reg or anything else you require. For this example, I'm going to sort them by year and reg group.



15. Click **Save and continue**

16. On the next screen, we can filter. For this report, I just want students who are pupil premium eligible. To add a filter, you can type the field into the search field and click on it to select it.

17. Click **Set parameters**

18. A slide over will open. Choose options as needed.

19. Click **Save**

20. Click **Next**

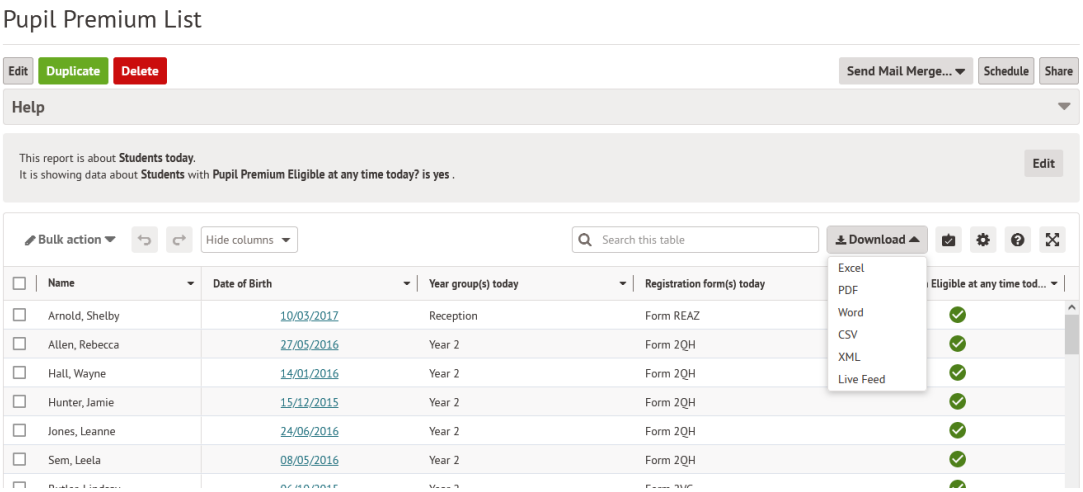
21. The next screen will create Groupings and works in the same way we added filters. This is useful if you want totals per year or reg group. For this report though, we won't add any groupings as we want a list of students.

22. Click **Next**

23. The next screen lets us add Collations, meaning we can group the report by year or reg group. If you use collations and export to Excel, it will put each group on a different tab.

24. Click **View Report**

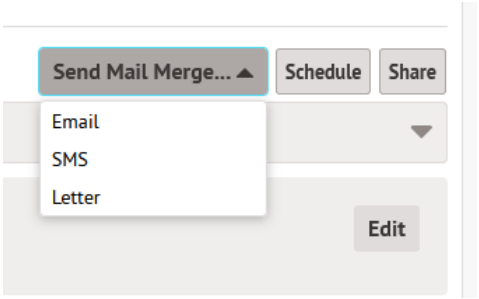
25. From this screen, you can download your report using the download button. There are multiple formats available depending on what you need it for.



05| Sending a Mail Merge from Custom Reports

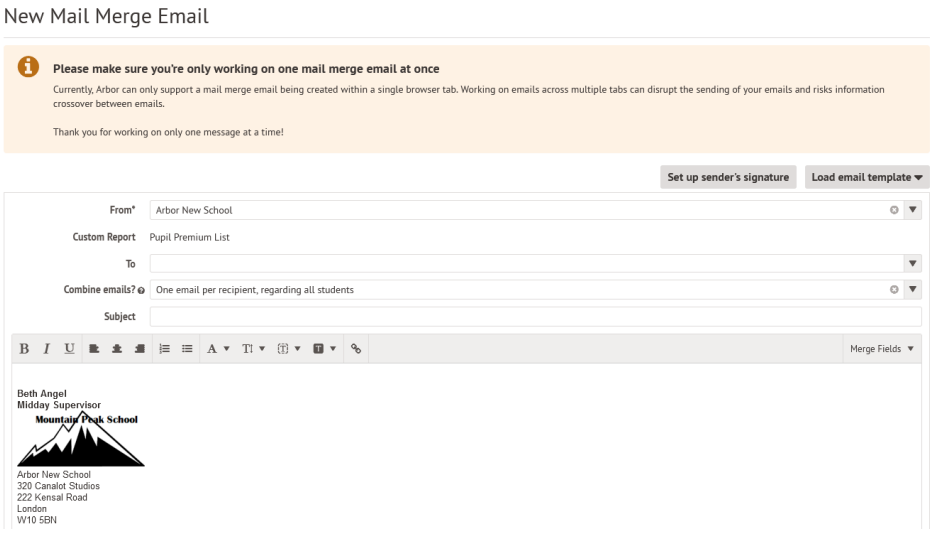
You are able to send a mail merge from the View Report screen in Arbor. This makes it easy to send communications to custom groups of students/their guardians. For example, if you create a report that filters on 90% or less attendance, you can send a general message to all parents to warn them their child's attendance is low.

1. In the View Report screen, click the Send Mail Merge drop down. It will give you 3 options.



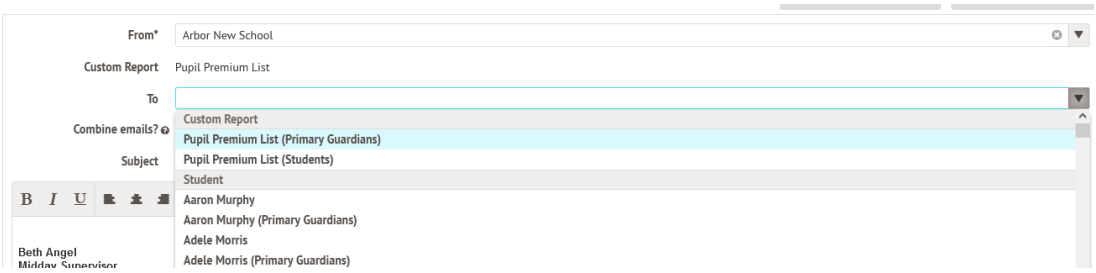
2. For this example we will use email, but the premise is very similar for each.

3. Once you click on Email, you will get the below screen:-

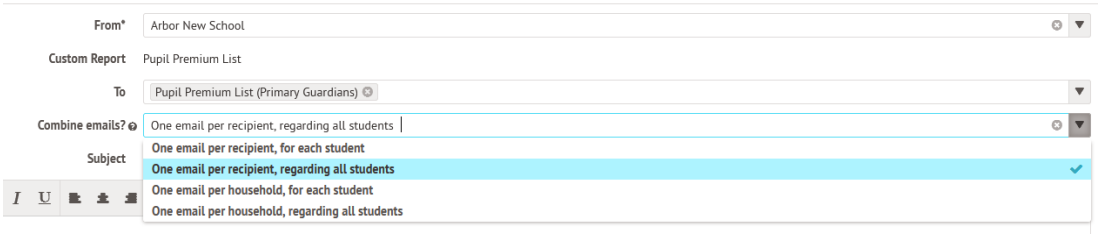


4. The From field will default to your school but you are also able to click in here and choose to send it as yourself. Choose whichever option you would prefer.

5. The To field gives you a few options. You can either send to the students, their primary guardians or individual students/guardians from the report list. The most common choice here would be Primary Guardians.



6. Combine emails? can be used to specify whether you would like one email per recipient or household.

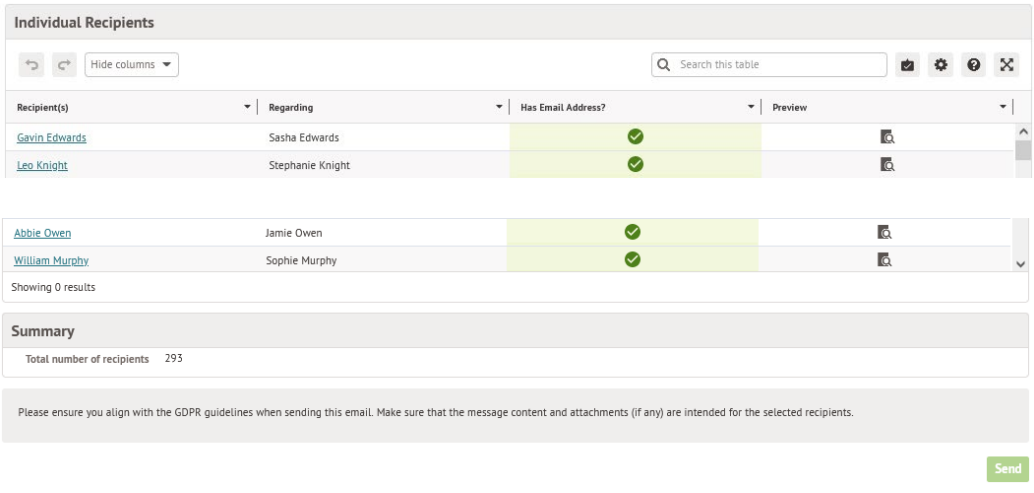


7. You will also need to enter a Subject.

8. The text field pre-populates your signature and gives you some basic formatting options. This is where you type your email.

9. The Merge Fields drop down allows you to pull in pupil information e.g. their name, pronouns, DOB, Reg Group, as well as any report fields you chose when creating your report. This allows you to customise each email as it automatically inputs the fields for each student.

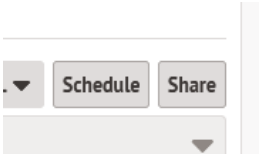
10. Once you have composed your email, click Proceed at the bottom to view the list of recipients and preview individual emails. If you're happy, click Send.



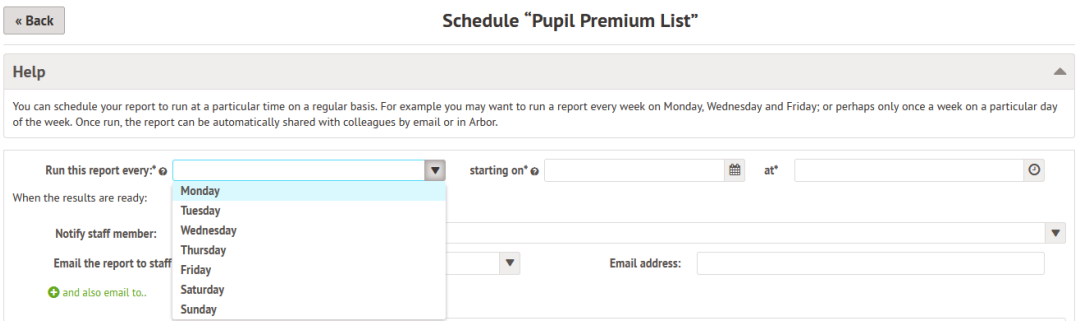
06| Scheduling a Custom Report

Custom reports can also be scheduled to automatically send to specific members of staff or external users via email. This vastly reduces the amount of time spent by office staff running reports regularly.

1. From the View Report screen, click Schedule in the top right corner.



2. On the next screen, you will be asked which days you would like the report to run, when to start from and what time of the day you would like.

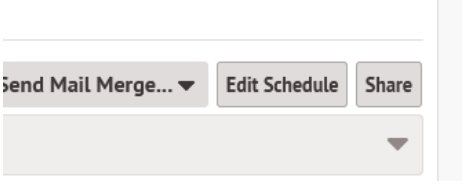


3. You can choose to notify the staff member via Arbor notifications or to email them. Fill in either the Notify staff member or Email the report to staff member field, or both if you would prefer both, with the staff members who should receive the report. To add multiple, click and also email to.. to add another.

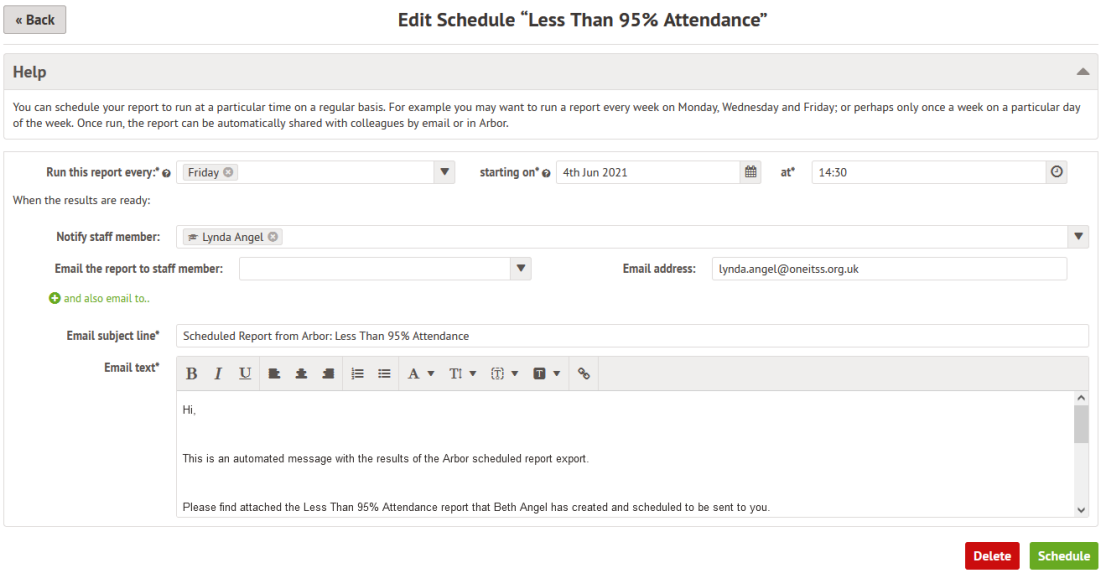
4. You can also email to external people via the Email Address field.

5. Enter a subject line and email text then press Schedule.

6. If a report has already been scheduled and you would like to amend or cancel the schedule, open the report from your All Reports list then click Edit Schedule



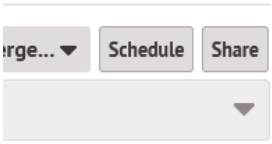
7. Amend as needed or click **Delete** at the bottom if you'd like to stop the scheduled emails.



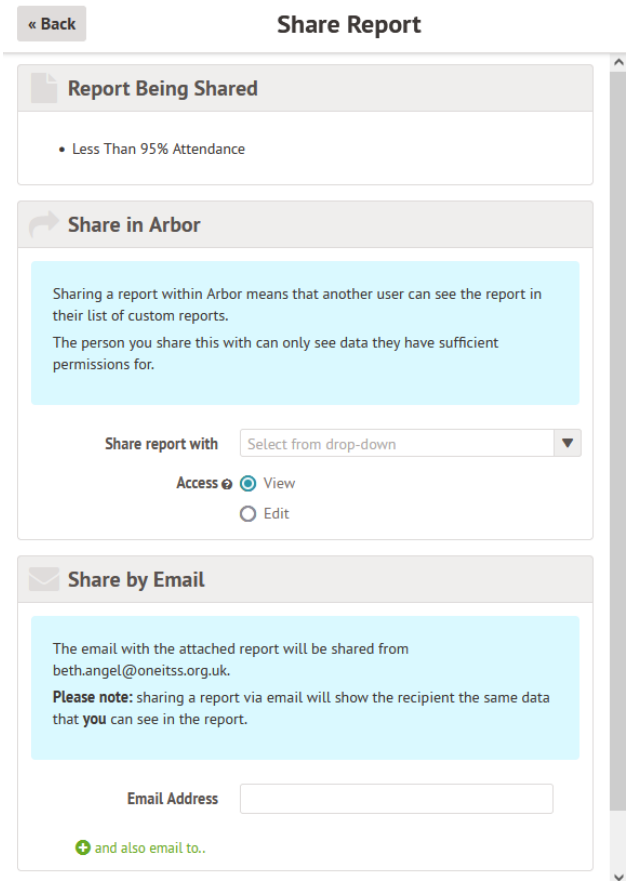
07| Sharing a Custom Report

If you need another member of staff to access or amend your report, you can share it with them in Arbor. You can also share a report via email and this will send the results to whoever you specify.

1. From the View Report screen, click Share



2. A slide over will appear giving you options to either share in Arbor or via Email.



3. To share in Arbor, search for the staff member(s) in the Share report with drop down and click on their names to add to your selection.

4. To share results via email, enter their email address. If sending to multiple recipients, click **and also email to..** and enter them one by one. Please be aware that they will be able to see all data in that report.

5. Click **Share Report** to share.