

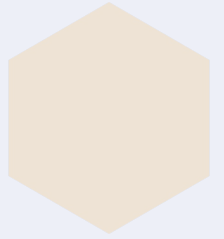
DATA TRANSFER



Exporting applicant and contact data from Admissions+ into Arbor

Admissions⁺
Powered by applicaa





Exporting applicant & contact data to Arbor

How data moves

Data is moved into Arbor from Admissions+ using the Data area of your platform. This guide covers each step of the process. To cancel an export that has already started, please contact Support for assistance.

Before you begin

Ensure you have created a pre-admissions group in Arbor to receive the new applicants into before you start exporting any data from Admissions+.

PART 1

Exporting student & contact data

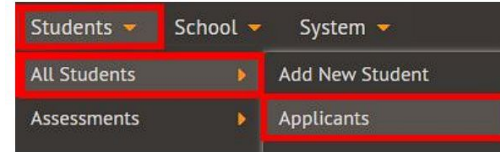
Create an intake season, set students to “completed”, then run the export wizard.



SETUP

Create an Intake Season in Arbor

1. Click **Students > All Students > Applicants**. If you don't see the Admissions options in your MIS, contact your MIS Support Provider.
2. Click **Add**.
3. Add the Academic Year (start & end dates auto-complete), Intake season name, and optionally the Published admissions and Target application numbers.
4. Click **Create Intake Season**.



Create Intake Season

Academic Year	2021/2022
Intake season name	Year 7 2021/22
Start date	1st Sep 2021
End date	31st Aug 2022
Published admissions number	150
Target application number	450

Cancel Create Intake Season

APPLICATION STATUS

Exporting students

Students can only be exported once their application status is **“completed”**. Use **Change Application Status**, select Completed, type the confirmation number shown, and click Update.

The screenshot displays a user interface for managing student application statuses. At the top, a student profile for 'Test Student #U-81EE' is shown with an 'APPLICATION STATUS' dropdown set to 'Completed' and a 'PENDING STATUS' dropdown set to 'Pending'. Below this is a navigation menu with 'Overview' selected. A table of students is visible, with the 'Change Application Status' button highlighted. A modal window titled 'Change Application Status' is open, showing a dropdown menu with 'Completed' selected, a text input field containing '21', and 'Close' and 'Update' buttons. Red arrows point to the 'Completed' status in the modal and the 'Update' button.

ID	Student Code	First Name	Last Name	Birthday
21876	U-0084	Test	Jane	
21767	U-81EE	Test	Student	10/09/2007
21040	U-4DAB	Friedie	Curtis	

1 EXPORT WIZARD

Start an export

Go to **Data > Export**, click **Start an Export** at the top right, give your export a name, select **Arbor**, then click **Next**.

The screenshot displays the 'Export Data' wizard interface. On the left, a vertical navigation menu contains icons for DATA, Import, Export, Uploaded Files, and First Media Applications. The 'Export' option is highlighted with a yellow box and an arrow. The main content area shows a progress bar at the top with five steps: 'Where to export', 'What to export', 'Field selection & configuration', 'Select Students', and 'Export Summary'. The 'Export Summary' step is highlighted with a yellow box and an arrow pointing to a 'Next >' button. Below the progress bar, the 'What to export' step is active. It features a text input field labeled 'Give your export a name' with the placeholder text 'Type name of export here'. Below this, a question asks 'Where do you want to download the data?'. Three options are presented as cards: 'An Excel .CSV File' with a CSV icon, 'My School MIS' with the Arbor logo, and 'A Zipped Folder' with a ZIP icon. The 'My School MIS' option is highlighted with a yellow box and an arrow. A blue chat icon is visible in the bottom right corner.

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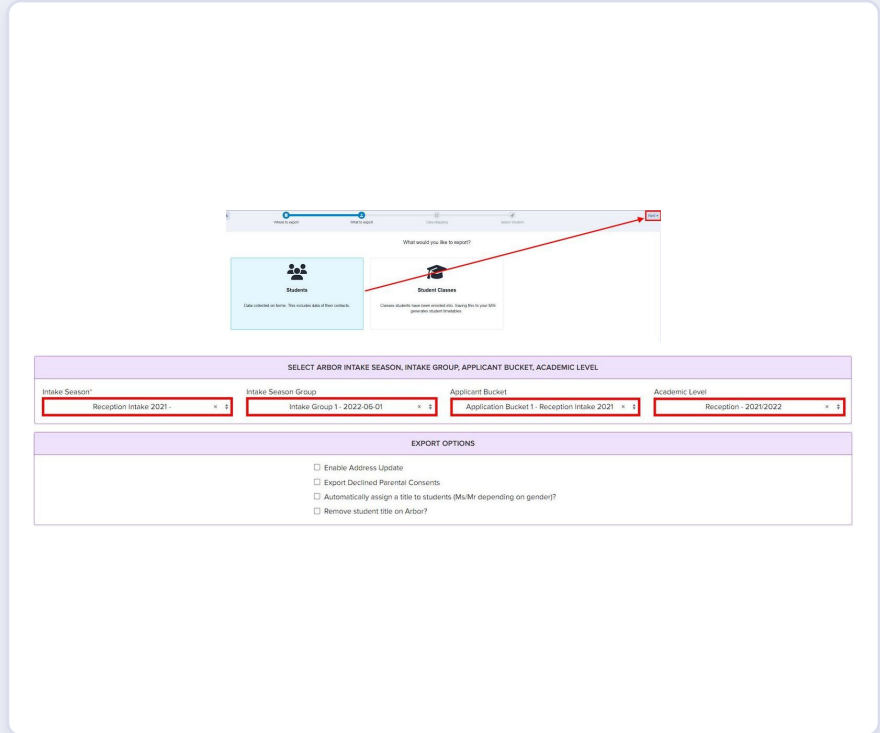
EXPORT WIZARD

Choose what to export

Select **Students**, then click Next.

On the next step, set the Intake Season, Intake Group, Applicant Bucket and Academic Level. Additional Export Options are also available.

Data Mapping options are preselected and now include **User Defined Fields**. Click Next.



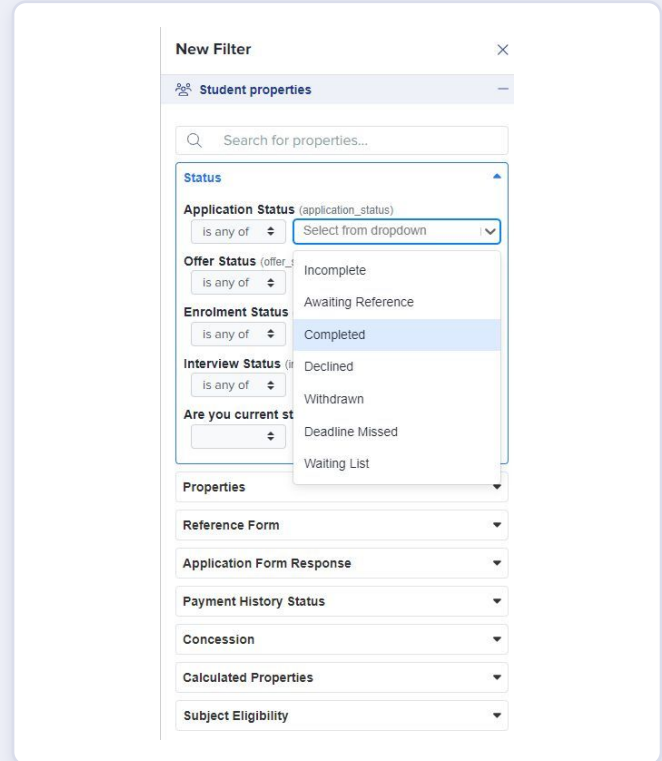
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EXPORT WIZARD

Select your students

On the next step, you may use the **Advanced Filters** and then **Select All** students for your export if required — or select only the specific students you want to export.

Once done, click **Next**.



STEP 4 · STUDENT MATCHING

Arbor student mismatch checking

Potential mismatched students are displayed if they differ from your MIS. Click **Resolve** for each. Choose **Ignore difference and continue exporting** to confirm a match, or **These are not the same person, unlink them** if not. Click Confirm & Next.

Arbor Student Mismatch Checking

Potential mismatch students!
We have detected that 6 students you are exporting from Admissions+ seems to have changed since it was originally in your MIS. This could be intentional, for example if a student has changed how they spell their name, or they may have moved house.

Unresolved Matches 6 Resolved Matches 0

Admissions+ Students	Arbor Students	Resolution	Actions
Aaron Murphy	Aaron Murphy	Not resolved	Resolve
Abbie Adams	Abbie Adams	Not resolved	Resolve
Abigail Parker	Abigail Parker	Not resolved	Resolve
Abigail Miller	Abigail Miller	Not resolved	Resolve
Abigail Stevens	Abigail Stevens	Not resolved	Resolve
Adam Rogers1	Adam Rogers	Not resolved	Resolve

Resolve Potential Mismatch

Fields	Admissions+ Student	Arbor student
Name	Abigail Parker	Abigail Parker
Student ID	1162	452
Gender	MALE	FEMALE
DOB	26/06/2007	26-06-2007
Telephone 1	+44770990339	
Telephone 2	+442037705335	
Email	abigail.parker@arbor-mail.com	abigail.parker@arbor-mail.com
Address		2 Chancroft Way, W12 8JX
Contact 1	Joseph Parker	Joseph Parker
Contact 2	Theresa Parker	Theresa Parker

Select resolution:

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

2 / 6 Resolved Confirm & Next

STEP 4 · STUDENT MATCHING

Reviewing resolved matches

Once resolved, students appear in **Resolved Matches**. Click **Change** to pick a different option if needed.

Click **Go to Student Matching** once all students have been checked.

Please note If there are too many mismatched students, you'll need to contact Support or your Customer Success Manager, and won't be able to continue the export.

The screenshot displays the 'Arbor Student Mismatch Checking' interface. At the top, a yellow warning box states: 'Potential mismatch students! We have detected that 1 student you are exporting from Admissions+ seems to have changed since it was originally in your MIS. This could be intentional, for example if a student has changed how they spell their name, or they may have moved house.' Below this, a navigation bar shows 'Unresolved Matches' and 'Resolved Matches 1'. A table lists the resolved matches with columns: Admissions Student, Arbor Students, Resolution, Resolved on, Resolved by, and Change resolution. The table contains one entry for Aaron Murphy. A 'Change' button is visible in the 'Change resolution' column. A 'Go to Student Matching' button is located at the bottom right. A red box highlights the 'Resolved Matches 1' tab, and red arrows point from it to the 'Change' button and the 'Go to Student Matching' button. A second yellow warning box at the bottom of the interface reads: 'Potential mismatch students! We have checked the data you are about to import, and multiple records in Ar seem to have changed significantly from when they were originally in your MIS. This appears to be the case with 62 records in this report... To prevent the possibility of corrupting the data in your MIS, we need your consent to either: 1) ignore the data we will have the best to take a look at it, 2) download mismatched by.' A 'Cancel & Repeat later' button is located below this second warning box.

Admissions Student	Arbor Students	Resolution	Resolved on	Resolved by	Change resolution
Aaron Murphy	Aaron Murphy	ignore difference and continue exporting	08 Feb 2023, 12:38	Andy Applicaes Support	Change

STEP 5 · STUDENT MAPPING

Arbor student mapping

Resolve any Unresolved Matches:

Merge to Arbor student — merge with the selected student.

Export as new student — export as a brand-new Arbor student.

Skip this student — do not export them.

Click Confirm & Next, then Next.

The screenshot displays the 'Arbor Student Mapping' interface. At the top, a yellow warning box states: 'Potential duplicates detected! We have detected that 12 students you are exporting may already exist in Arbor. Please review the rows below and let us know if we should create a new person, or match it to an existing person? This typically takes around 3 minutes to check.' Below this is a table with columns: Admissions+ Students, Arbor Students, Matching Score, Resolution, and Actions. The first row shows a match for 'Zzlimmy Zzteelington-Fryer-Sampsonandellallah' with a 'Not resolved' status and a 'Resolve' button. A red arrow points from the 'Resolve' button in the table to a larger, detailed view of the 'Resolve Suspected Duplicates' dialog box. This dialog box shows the same student information and offers three options: 'Merge to Arbor student #1', 'Export to new student', and 'Skip this student'. A red arrow points from the 'Merge to Arbor student #1' button to the 'Export to new student' button, and another red arrow points from the 'Export to new student' button to the 'Skip this student' button. At the bottom of the dialog, there is a 'Confirm & Next' button.

STEP 6 · CONTACT MATCHING

Arbor contact mapping

On the Arbor Contact Mapping step, existing Arbor contacts are displayed where they match contacts in Admissions+. The process detects any mis-matched contacts and prompts you to resolve them.

The screenshot shows the 'Export Data' interface with a progress bar at the top. The progress bar has five steps: 'Where to export', 'What to export', 'Data Mapping', 'Select Student', and 'Students/Contacts Matching'. The 'Students/Contacts Matching' step is currently active. Below the progress bar, there is a section titled 'Arbor Contact Mismatch Checking' with tabs for 'Unresolved Matches' and 'Resolved Matches'. A table displays the following data:

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

At the bottom right of the table area, there is a button labeled 'Go to Contact Matching'.

The 'Resolve Potential Mismatch' dialog box compares an 'Admissions Contact' and an 'Arbor contact'. The fields are as follows:

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

Below the table, there are two radio button options for resolution:

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

At the bottom of the dialog, there is a green progress bar showing '1 / 1 Resolved' and a blue button labeled 'Confirm & Next'.

STEP 6 · CONTACT MATCHING

How contacts are matched

Match To

Links the A+ contact to an existing Arbor contact, saves the Arbor Contact ID back to A+, and updates the Arbor contact's data.

New Contact

Creates a brand-new person in Arbor.

Skip Contact

Does nothing — the contact is not imported.

Matching rules: the system finds Arbor contacts matching the name, title, email and postcode on Admissions+. Potential matches show a confidence colour — **green** strong, **amber** partial, **red** weak.

Potential Matches

Administrator has identified several individuals in Arbor that might be a match for the people you are trying to export. Please review them below and for each potential match, please indicate which individual should be matched.

Arbor Contact	Admissions+ Contact
<p>Mr. [Name] [Address] [City] [Postcode]</p>	<p>Mr. [Name] [Address] [City] [Postcode]</p>
<p>Mr. [Name] [Address] [City] [Postcode]</p>	<p>Mr. [Name] [Address] [City] [Postcode]</p>
<p>Mr. [Name] [Address] [City] [Postcode]</p>	<p>Mr. [Name] [Address] [City] [Postcode]</p>

New Contact Skip Contact

EXPORT REPORT

Checking your export

Once the export finishes, click the report to check which students were exported successfully.

If there were any issues, the reason appears in the **Arbor Notice** column for each student.

Click the **Arbor Student ID** to view the application directly in Arbor.

The screenshot displays a confirmation message box at the top with the text "Export Finished!" and "1 students were processed!". Below this text is a document icon and a link that says "Click to view report". A red arrow points from this link to the "Arbor Notice" column of a table below. The table has columns for "#", "View on A+", "first_name", "last_name", "Arbor Notice", "View on Arbor", and "Type". The first row of data shows a student with ID 2420, first name Test Aric, last name Test Little, an empty "Arbor Notice" field (highlighted with a red box), ID 1252 in the "View on Arbor" column, and a "Success" status in the "Type" column. Another red arrow points from the "View on Arbor" column to the "Type" column.

#	View on A+	first_name	last_name	Arbor Notice	View on Arbor	Type
1	2420	Test Aric	Test Little		1252	Success

PART 2

Exporting classes to Arbor

Map your Admissions+ classes to Arbor classes to generate student timetables.



CLASSES

Before you export classes

Prerequisites

Students must be enrolled to their chosen courses in Admissions+ with status “**enrolled**”, and must also be enrolled in Arbor.

1. Navigate to **Data > Export**.
2. Click **Start an Export**.
3. Name your export, then select **Arbor**.
4. Click **Next**.



Where do you want to download the data?



Give your export a name

Classes Export

CLASSES

Mapping classes to Arbor

1. Select **Classes**.
2. Click **Next** to reach the Mapping step.
3. Choose a year via **Filter By Academic Level** (you can also filter Arbor classes by year).
4. Map your A+ classes to your Arbor classes. If you can't see them, click **See all Arbor classes**.
5. Click **Next** once done.

Student Classes

Classes students have been enrolled into. Saving this to your MIS generates student timetables

— Back | Where to export | What to export | **Data Mapping** | Select Student | Next >

Select data you want to export

See all Arbor classes

FILTER BY ACADEMIC YEAR & LEVEL

Filter by academic year: 2022-2023 | Filter by academic level: Year 12

Showing 352 Arbor classes

MAP ARBOR CLASS AND ADMISSIONS+ CLASS

YEAR	ARBOR CLASSES	ADMISSIONS+ CLASSES
2022-2023	Chemistry Test Course	Select a value
2022-2023	Art and Design / Art R.ED Art SUBJECT_ART	KSS3 Art Year 9 - ACADEMIC_LEVEL_YEAR_9

CLASSES

Class export report

Click **Next** to reach the Export Report. Click the report to check which classes were exported successfully.

The screenshot displays the 'Export Data' interface. At the top, a progress bar shows four steps: 'Where to export', 'What to export', 'Data Mapping', and 'Select Student'. The current step is 'Data Mapping'. Below the progress bar, there are filter options for 'Academic year', 'Year group', and 'Subject'. A table titled 'MAP ARBOR CLASS AND ADMISSIONS- CLASS' lists various classes with columns for Year, Subject, Arbor Classes, and Admissions- Classes. Below the table, a summary table shows the export results.

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

Export Finished!

Click to view report

PART 3

Exporting form group data

Assign students to Form Groups with the Sorting Hat Wizard, then export them to Arbor.



FORM GROUPS

Exporting form group data

Use the **Sorting Hat Wizard** to assign students to Form Groups.

Once students have been allocated, their allocations can be exported — and students will be assigned to those groups in Arbor.

Map each Arbor registration form to the matching Admissions+ Sorting Hat group, then run the export.

Select data you want to export

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

[See all Arbor registration forms](#)

FILTER BY ACADEMIC YEAR

Filter by academic year:

Set Start Date & End Date

Start Date: End Date:

Showing 2 Arbor registration forms.

MAP ARBOR REGISTRATION FORM AND ADMISSIONS+ SORTING HAT GROUP

YEAR	ARBOR REGISTRATION FORMS	ADMISSIONS+ SORTING HAT GROUPS
2023/2024	Form 78G (2023/2024) Tutor: Alice Morgan	Form 78G (2023/2024) - 2023/2024 Import ×
2023/2024	Form 70F (2023/2024) Tutor: George Miller	Form 70F (2023/2024) - 2023/2024 Import ×

FAQs & useful links

Should I export in batches or all at once?

Batches work best — around 20 students at a time until you're familiar with the process, then larger batches.

When is the best time to export applicants?

Y7 & Primaries: as soon as they complete the Admission Form. Year 12: as late as possible, after Enrolment, to minimise data transferred.

When should I import CTFs?

Export your data from A+ first, then import your CTFs directly to Arbor.

Where can I find more information?

Guides and articles on importing and exporting data are in the Data & Integrations area of our Knowledge Base.



THANK YOU

Find this guide and more in the Data & Integrations area of the Applica Knowledge Base.