



SETTING UP ASSESSMENTS GUIDE

Please log Arbor assessment issues by emailing misassessment@bdcs.org.uk

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Business roles needed to set up assessments:

Administration Assistant or Assessment Coordinator role.

Assessment Headteacher, Deputy Headteacher and Headteacher roles also have the necessary permissions.

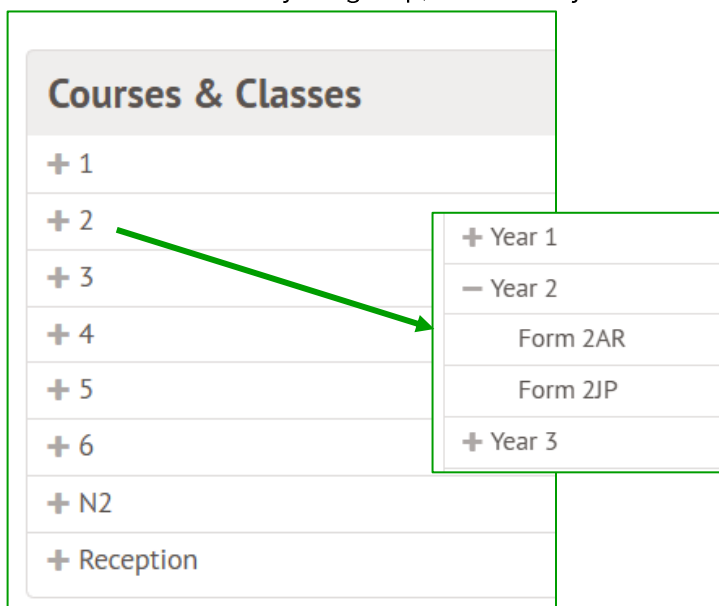
1. Checking the course structure

Check courses:

In Arbor, a course represents a structured learning program – in primary schools this is typically year groups and then classes. The course structure should have been set up by the office in the new school year setup, but we want to check it's set up correctly in terms of assessment, so classes will get the correct marksheets.

Go to **School > Programmes > Courses**

You should see each year group, and when you click on the **+** you should see the corresponding classes:



When you click on a year group and a class you should see the number of students enrolled:

Year 1	
Academic Lead	
Enrolment	60 Students
Admin	
Course name	Year 1
Abbreviation	Not set
Academic year	2024/2025
Component of	Nothing - top level component
Year group	Year 1
Subject	Not set
Linked Departments	Not set
Learning Aims	Not set
Students	60
Take attendance?	Lesson Attendance (UK DfE)

Year 1: Form 1HL	
Academic Lead	Helen Lloyd
Parent Course	Year 1
Enrolment	30 Students
Admin	
Course name	Form 1HL
Abbreviation	Not set
Academic year	2024/2025
Component of	Year 1
Year group	Year 1
Subject	Not set
Linked Departments	Not set
Learning Aims	Not set
Students	30
Take attendance?	Lesson Attendance (UK DfE)

If you have enrolled students or a year group missing (i.e. no Nursery) or if you have mixed year classes, then log a call with the BDSIP MIS team and we can help you rectify the issue.

Check that courses can be assessed:

We also need to check that the courses can have assessments created within them.

Go to **Students > Assessments > Annual Policy > Assessable courses**

Check that all the relevant year groups are showing.

If any are missing:

- Click on **Bulk Set Assessable Courses** (top right)
- Tick the relevant year groups
- Scroll down and click **Save Changes**

Reception	
Assessable Courses	<input checked="" type="checkbox"/> Reception
Year 1	
Assessable Courses	<input checked="" type="checkbox"/> Year 1

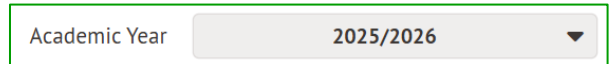
2. Setting up assessments

Once the school office has set up the new academic year in Arbor, with the term dates set and children assigned to their new classes, the assessments can be set up.

Copying the annual policy:

Go to **Students > Assessments > Annual Policy > Manage Assessments**

- Ensure the academic year is set to **2025/26**



Academic Year 2025/2026

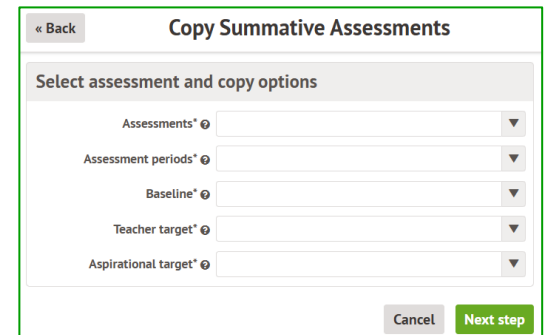
- Click on **Copy previous year's policy** button

Copy previous year's policy

- You will get a slideover to choose which assessments to copy – in most cases it will just be summative assessments

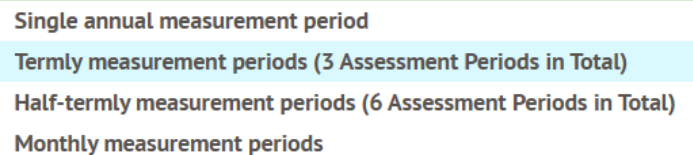
- Click on **Copy summative assessments**

- You will get this options window



- From the **Assessments** drop-down, click on the assessments you want to copy
 - Select them in batches, ensuring all the assessments selected will have the same assessment periods, and the same option for baseline and targets, e.g. do Y1-6 core assessments as a batch, EYFS as a batch, Foundation subjects as a batch, and test score assessments as a batch.

- From the **Assessment periods** drop-down, select how often you want to complete the assessments
 - You will probably want termly assessments, which also includes baseline
 - It's always best to use the same assessment periods as last year
 - If you have a marksheet that can be completed at any point in the year, select single annual measurement period



Single annual measurement period
Termly measurement periods (3 Assessment Periods in Total)
Half-termly measurement periods (6 Assessment Periods in Total)
Monthly measurement periods

- From the **Baseline** drop-down, select whether you want to **Copy the baseline from the previous academic year**, or **Rollover last assessment period mark**

Copy Baseline from previous academic year
Rollover last assessment period mark

- You will probably want to rollover the last assessment mark – so the grade at the end of last year becomes the baseline

- From the **Teacher target** drop-down, select whether you want to Copy the target from previous year or leave blank
 - You will probably want to leave blank for this year
 - Teachers can enter targets later

Copy Teacher Target from the previous academic year
Leave blank for this academic year

- From the **Aspirational target** drop-down, select whether you want to Copy the target from previous year or leave blank

Copy Aspirational Target from the previous academic year
Leave blank for this academic year

- You will probably want to leave blank for this year

- Teachers can enter targets later
- You now have a list of the assessments in the selected batch, with a table for each assessment showing the groups (usually classes) that were enrolled in the assessments last year, and the relevant groups for this year (it will try to match them where it can), e.g.

BD v2.1 Reading			
Linked courses			
Bulk action ▼	↶ ↷	Hide columns ▼	<input type="text" value="Search this table"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
2024/2025 Student Groups		2025/2026 Student Groups	
Year 1: Form 1HL		Year 1: Form 1HL (2025/2026) (Course)	▼ <input type="checkbox"/>
Year 1: Form 1LM		Year 1: Form 1LM (2025/2026) (Course)	▼ <input type="checkbox"/>
Year 2: Form 2AR		Year 2: Form 2AR (2025/2026) (Course)	▼ <input type="checkbox"/>
Year 3: Form 3AM		Year 3: Form 3AM (2025/2026) (Course)	▼ <input type="checkbox"/>
Year 2: Form 2JP		Year 2: Form 2JP (2025/2026) (Course)	▼ <input type="checkbox"/>
Year 3: Form 3ER		Year 3: Form 3ER (2025/2026) (Course)	▼ <input type="checkbox"/>
Year 5: Form 5ZCMA		Year 5: Form 5ZCMA (2025/2026) (Course)	▼ <input type="checkbox"/>
Year 4: Form 4CA		Year 4: Form 4CA (2025/2026) (Course)	▼ <input type="checkbox"/>
Year 6: Form 6LJ		Year 6: Form 6LJ (2025/2026) (Course)	▼ <input type="checkbox"/>
Year 4: Form 4SM		Year 4: Form 4SM (2025/2026) (Course)	▼ <input type="checkbox"/>
Year 6: Form 6SC		Year 6: Form 6SC (2025/2026) (Course)	▼ <input type="checkbox"/>
Year 5: Form 5TO		Year 5: Form 5TO (2025/2026) (Course)	▼ <input type="checkbox"/>
<input type="button" value="Add"/>		Showing 12 results <input type="button" value="Expand table"/>	

- Check that all the correct classes for the assessment, for this academic year, are listed. You can use the **drop down** to change the classes, **delete** the classes and add in additional classes using the **'Add'** button at the bottom of the table.
 - It doesn't matter if the list of classes in the left and right hand columns show different numbers of classes – just ensure you have the correct classes listed for this year.
- Above each table is a linked courses drop down:

BD v2.1 Reading	
Linked courses	<input type="text"/>

- From the drop-down select the relevant year groups, for example a Reading assessment used by years 1 to 6 will need courses 1-6 added:

Linked courses

🏠 Year 1 (2025/2026) ✕

🏠 Year 2 (2025/2026) ✕

🏠 Year 3 (2025/2026) ✕

🏠 Year 4 (2025/2026) ✕

🏠 Year 5 (2025/2026) ✕

🏠 Year 6 (2025/2026) ✕

- Check each of the assessments in that batch, and when you are happy with them all, click on **‘Copy assessments’** at the bottom of the page.
- You will be returned to the **‘Manage 2025/26 Assessments’** screen – select the next batch of assessments and repeat the steps above.

Checking terms:

Go to **Students > Assessments > Annual Policy > Assessment Periods**

- The assessment periods in use will be visible:

Academic Year

2025/2026

Assessment Periods

Termly measurement periods

4 assessments using this period set

- Click on ‘Termly measurement periods’ and check there are three terms listed (dates may be different):

Assessment Periods		
Autumn Term	01 Sep 2025 - 04 Jan 2026	▶
Spring Term	05 Jan 2026 - 12 Apr 2026	▶
Summer Term	13 Apr 2026 - 20 Jul 2026	▶

- Check that the names of the assessment periods are the same as the previous year – **this is essential for helloData schools, or the assessments will not filter through.**
 - If the names are not the same (e.g. Autumn, Spring, Summer for last year, but Autumn Term, Spring Term and Summer Term for this year), click on the terms and change the names for this year to match the previous year. Click **‘Done’** when the names match.

3. Setting baselines and teacher targets

Once the annual policy has been set up for the academic year, you can set the baselines and teacher targets.

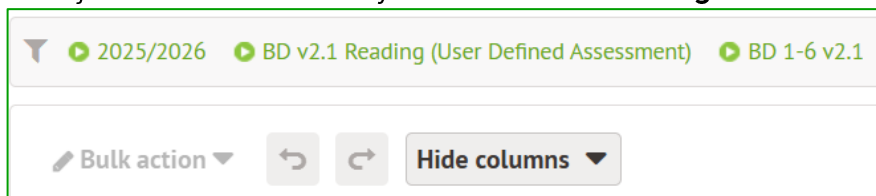
Notes:

- If you set the baseline to copy across the end of previous year's attainment, you will not need to set the baseline now.
- You may wish teachers to add the baseline and targets – in which case give them a copy of this step.

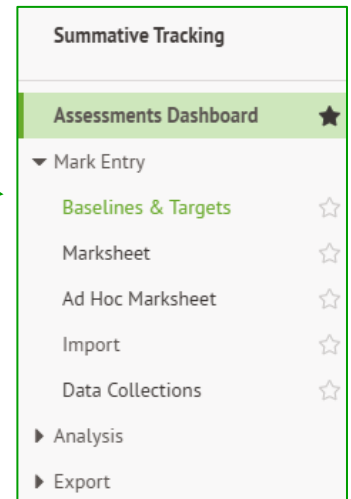
Entering baselines and teacher targets:

Go to **Students > Assessments > Summative Tracking**

- On the left-hand **Mark Entry** menu, click on **Baselines & Targets**
- A subject will be automatically selected – click on the **green filter**

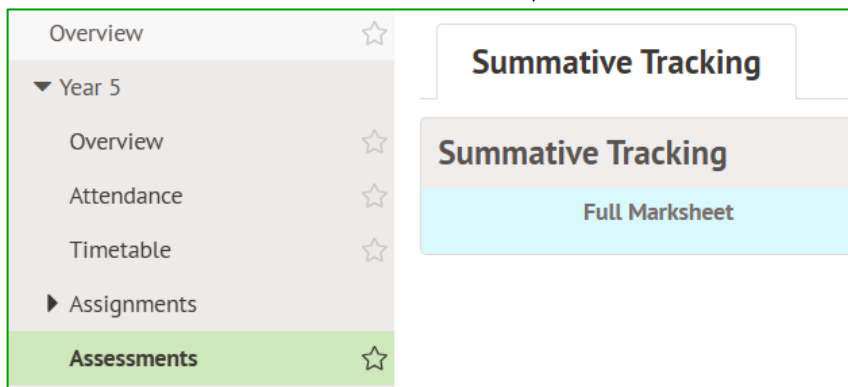


- Select the year group / class (choose course)
- Select the assessment you want to enter data for and the relevant grade set (select default)
- Click **Save changes**
- Enter baseline data (if you chose to copy across the end of previous year's attainment as the baseline, the baseline column will already be populated)
- Enter teacher target if appropriate (school target may already be populated if this was configured during set up)

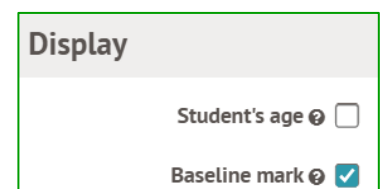


To enter baseline for more than one subject at a time, go to **School > Programmes > Courses**

- Click on relevant **year group** (or expand and click on class)
- Click on **Assessments** on left hand menu, then **Full marksheet** in the central window



- Baselines can then be entered
- If the baseline columns are not showing, click in the filter at the top and check that Baseline mark has been ticked



4. Navigating marksheets and entering data

Further guidance on Arbor Help Centre: [Getting to the summative assessment marksheet and adding marks](#)

Accessing the marksheets:

There are various ways to access the full marksheet, depending on if you are a class teacher or not.

Class teachers - Method 1:

- From Arbor homepage, click on your class in **My Calendar**
- Click on **Assessments** (bottom of left-hand menu)
- Click on **Full Marksheet**

Class teachers - Method 2:

- In search bar at top of page, search for your class and select **Class name - Course**
- Click on **Assessments** (halfway down left-hand menu)
- Click on **Full Marksheet**

Admin / SLT - Method 1:

- From **School** menu go to **Programmes** and click on **Courses**
- Click on **Year group**, or expand and click on **Class**
- Click on **Assessments** (halfway down left-hand menu)
- Click on **Full Marksheet**

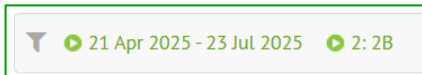
Admin / SLT - Method 2:

- In search bar at top of page, search for class / year group and select **Class name / Year group - Course**
- Click on **Assessments** (halfway down left-hand menu)
- Click on **Full Marksheet**

Changing filter and hiding columns:

The marksheet will show the data entry columns for the current term by default.

Click in the **filter setting** at the top to change the filter:



For example, change the start date to also include columns showing data from previous term, or filter the assessments in the marksheet.

Note – if particular columns aren't displayed in the marksheet, check they are selected in the filter.

Use the **hide columns** drop-down to hide / show columns; for example if you are not using the score columns these can be hidden, or you can hide columns if you want to focus on a particular subject.

Entering marks:

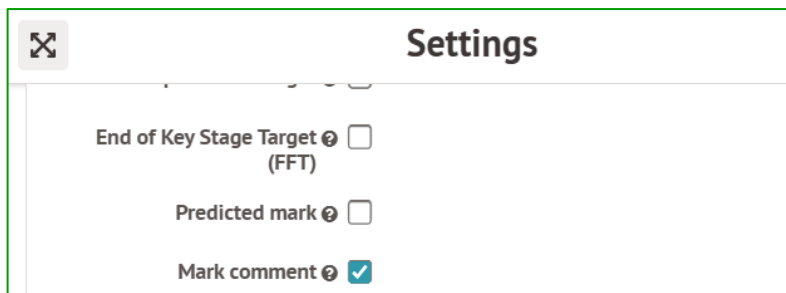
Click on the three dots next to a column name and select **Autosize** to resize an individual or all columns. Drag columns to change the order in which they are displayed.

There are different ways to enter marks:

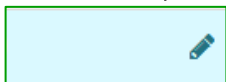
1. Entering marks individually:
 - Click a cell to open the drop-down menu of values to select from (they appear in alphabetical order).
 - Start typing in the cell – auto-complete will suggest matches. Press enter key to save the value and move to the cell below. Press enter key again to start typing in the next cell.
2. Copying and pasting marks:
 - If you already have marks in another document, these can be copied and pasted into the marksheet.
 - Ensure the pupils are in the same order, the marks are the same type and the columns displayed are in the same order.
 - Highlight and copy (CTRL+C) the data from the spreadsheet, click on the first relevant cell in the marksheet (or highlight the cells) and paste (CTRL+V).
3. Bulk entering marks - if you have multiple pupils all with the same mark:
 - Use the tick boxes to select the pupils you want to give the same mark to
 - From the **Bulk action** drop down, select **Bulk edit marks**
 - In the slideover select the relevant subject from the **Assessment** drop down, and term from the **Period** drop down. Click **Next**
 - Select the relevant mark from the **Mark** drop down and click **Save marks**.

Adding comments:

You can also add comments to support the mark you have given. You need to use the filter to show the comments box:



Click on the pencil in the cell next to the mark entry and enter the comment in the pop-up window.



5. Analysis – Overview dashboard

Go to **Students > Assessments > Summative tracking**

- From **Analysis** menu on left, click on **Overview dashboard**
- The overview dashboard enables you to easily see an overview of key assessment measures; these have to be set up first.

Set up school assessment measures:

Go to **Students > Assessments > Annual Policy > School Assessment Measures**

You need to consider what key assessment measures you want to use, for example:

EYFS:

- All areas EXS and above
- GLD EXS and above
- Each of 7 areas EXS and above

KS1/2:

- RWM EXS and above
- RWM GDS
- Each of Reading, Writing and Maths EXS and above
- Each of Reading, Writing and Maths GLD

To create a measure:

- Click on **Create new measure for 2025/2026**
- Enter the measure name
- Select if you this to be a key measure (key measures appear on the dashboard, others appear on the
- Select if measure considers a student's grade or target
- Select the assessments that are relevant (all or all and in one...)
- Select if upward trend is positive or negative
- Click **Create measure**
 - *Example for RWM EXS+ measure:*

The screenshot shows the 'Create new measure' form. At the top, 'Measure name*' is 'RWM EXS and above'. Below it, 'Key measure*' has 'Yes' selected. The 'Measure Rules' section has 'This measure considers a student's' set to 'Grade'. Under 'in all the assessments', 'BD v2.1 Maths' and 'BD v2.1 Reading' are selected. Under '... and in one of these assessments', 'BD v2.1 Writing' is selected. '... and an upward trend is*' is set to 'Positive'. At the bottom are 'Cancel' and 'Create measure' buttons.

The details of the measure will be shown and rules need to be set up:

- Click on **Add new assessment rule**
- Select year group(s) relevant for this rule
- Complete rule for **each** assessment
- Click **Add rule**
 - *Example for RWM EXS+ measure:*

The screenshot shows the 'Create Assessment Rule' form. At the top, 'When students are in' has year groups 1 through 6 selected. The 'Assessment Rule' section has 'All These Assessments' selected. Under 'For the assessment', 'BD v2.1 Maths' is selected, and '... they should be*' is 'Achieving at least'. Under '... grade*', 'EXS' is selected. This pattern repeats for 'BD v2.1 Reading' and 'BD v2.1 Writing'. At the bottom are 'Cancel' and 'Add rule' buttons.

The details of the measure and rules will be shown. Additional rules can be added if needed, or click **Back** to return to **School assessment measures** page, where additional measures can be created.

Example measures and rules:

Measure name	Measure assessments	Rule year groups	Rule for each assessment
GLD EXS and above	CL ListenAttUnd CL Speaking PSED SelfReg PSED ManagSelf PSED BuildingRel PD GrossMotor PD FineMotor Lit Comprehension Lit WordReading Lit Writing Maths Number Maths NumPatterns	Nursery and Reception	Achieving at least EXS
EY All Areas EXS and above	Strands above plus: UW PastPresent UW PeopleCulCom UW NatWorld EAD CreatingMat EAD BeingImagExp	Nursery and Reception	Achieving at least EXS
EY CL EXS and above	CL ListenAttUnd CL Speaking	Nursery and Reception	Achieving at least EXS
EY PSED EXS and above	PSED SelfReg PSED ManagSelf PSED BuildingRel	Nursery and Reception	Achieving at least EXS
EY PD EXS and above	PD GrossMotor PD FineMotor	Nursery and Reception	Achieving at least EXS
EY Lit EXS and above	Lit Comprehension Lit WordReading	Nursery and Reception	Achieving at least EXS
EY Maths EXS and above	Maths Number Maths NumPatterns	Nursery and Reception	Achieving at least EXS
EY UW EXS and above	UW PastPresent UW PeopleCulCom UW NatWorld	Nursery and Reception	Achieving at least EXS
EY EAD EXS and above	EAD CreatingMat EAD BeingImagExp	Nursery and Reception	Achieving at least EXS
RWM EXS and above	Y1-6 Reading Y1-6 Writing Y1-6 Maths	Year 1 to 6	Achieving at least EXS
RWM GDS	Y1-6 Reading Y1-6 Writing Y1-6 Maths	Year 1 to 6	Achieving at least GDS
Reading EXS and above	Y1-6 Reading	Year 1 to 6	Achieving at least EXS
Writing EXS and above	Y1-6 Writing	Year 1 to 6	Achieving at least EXS
Maths EXS and above	Y1-6 Maths	Year 1 to 6	Achieving at least EXS
Reading GDS	Y1-6 Reading	Year 1 to 6	Achieving at least GDS
Writing GDS	Y1-6 Writing	Year 1 to 6	Achieving at least GDS
Maths GDS	Y1-6 Maths	Year 1 to 6	Achieving at least GDS

Analysing school assessment measures:

Go to **Students > Assessments > Summative tracking**

- From **Analysis** menu on left, click on **Overview dashboard**

By default, the dashboard will show assessment measures for all current roll pupils for that date; if a measure was set up for multiple year groups, the percentage will be for all the relevant year groups combined.

- Click on **All Measures** tab to show percentages for all measures created (key measures plus any others created).
 - Click on a percentage to get to demographics page for that measure (see also below)
- From **Headlines** tab, click on a measure to show breakdown by year group and by demographic.
 - **Hover** over a bar in the graph to see the number of pupils in that group



- **Click** on a bar in the graph to see the pupil list in that group
 - Click **back** to return to dashboard
- To show measures for a specific year group:
 - Click on **Settings**
 - Change date (if relevant)
 - From **students** drop down select year group
 - Click on **save changes**
 - *Not all the measures will be relevant for each year group, so there will be some N/A.*
- **Classes** are not listed on the demographics page, so select an individual class from **Settings** to see data for that class.

You may also want to set up measures for groups that are below the key measures, or at expected in two out of the three subjects for combined measure.

Further guidance from Arbor:

- [Set up key measures of students above, at or below with School Assessment Measures](#)
- [Our built-in summative assessment analysis options for Primaries](#)