CUSTOM REPORT WRITER GUIDE

CONTENTS PAGE

Permissions

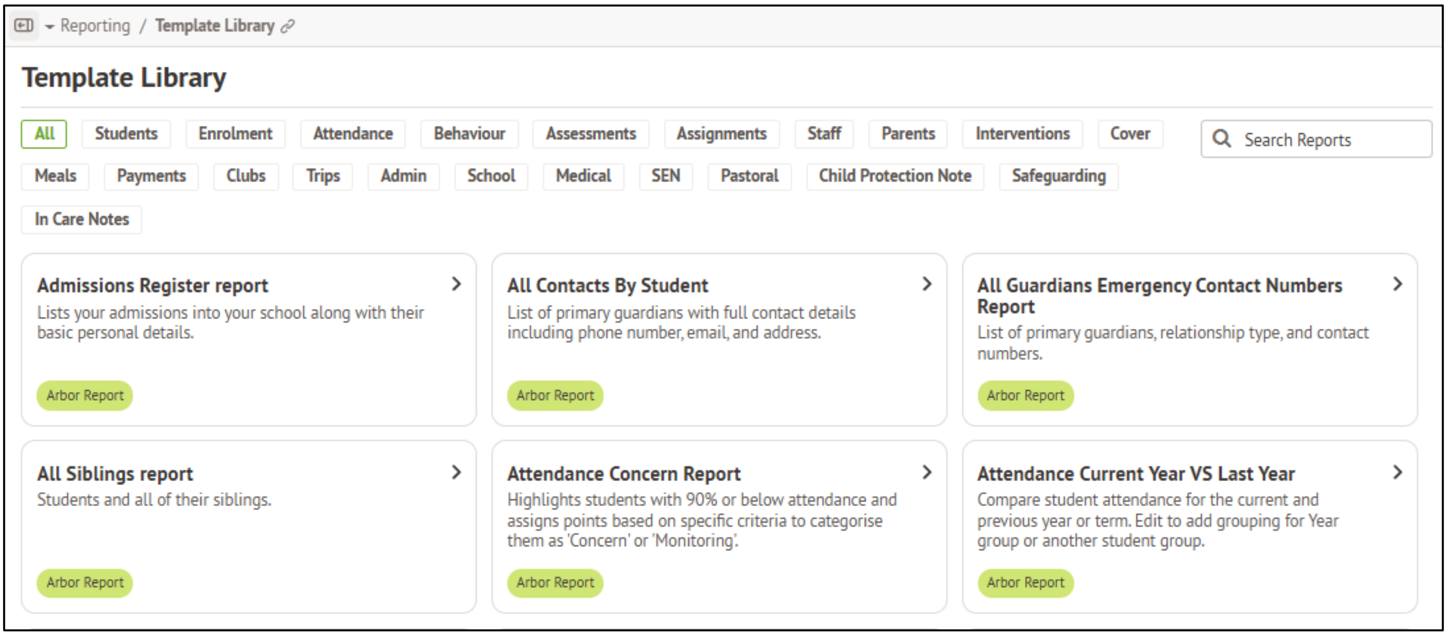
Access to Custom Report Writer reports is determined by user permissions. Users can only view data they have permission for, and fields may be redacted if permissions are lacking. Sharing reports within the MIS or via email respects the sender's permissions, affecting what recipients can see. Superuser access allows viewing all reports regardless of sharing.

To create your own custom reports or edit reports shared with you, you will need the **School: General Admin: Export Data** permission

1. Reporting Templates

The reporting templates located here are pre-built reports designed to save you time. They provide core building blocks and serve as a strong starting point for creating your own reports.

Reporting > Template Library

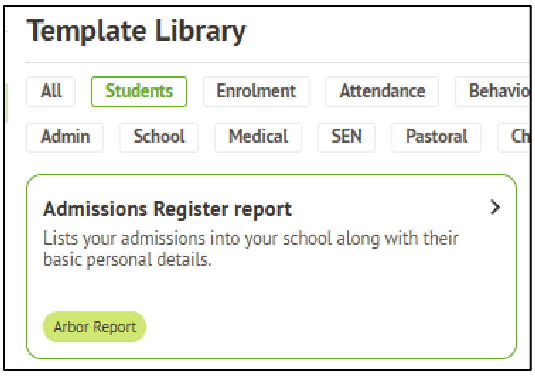


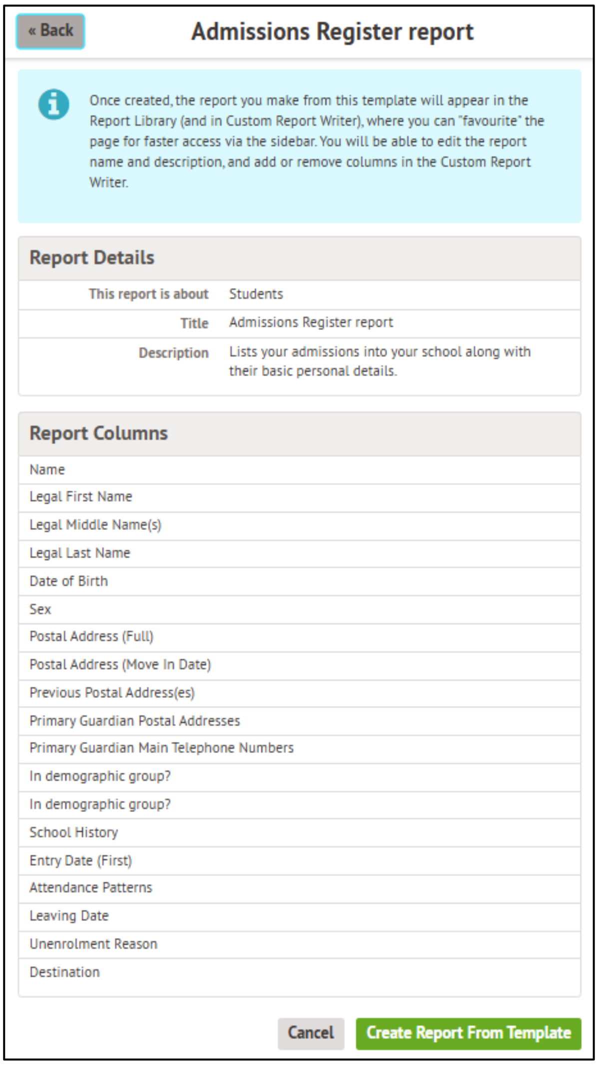
Searching for Report Template

There are a couple of ways to search for a report template. You can use the badges shown below to browse by subject, or use the **Search Reports** function to filter by name.

Details of Report Templates

- **Click on a report template**, for this example we are clicking on the Admissions Register report template





- A slide out will appear on the right-hand side showing you the Report Details, such as the **focus** of the report (Students), the **Title** and the **Description**

- A list of **Columns** that are included in this report are also shown

- To create a report using this template, click on the green **Create Report Form Template** button

- The report will then run and display the results

- You can then **Edit** the report as necessary and you can also **Share** the report with other school staff members

(see section 8 for details of sharing reports)

NOTE:
Once you copy a report template, it is automatically added to and listed in your Custom Report Writer, within the Active tab reports area.
School > Custom Report Writer

ARBOR Help Centre article listing available templates in the Template Library

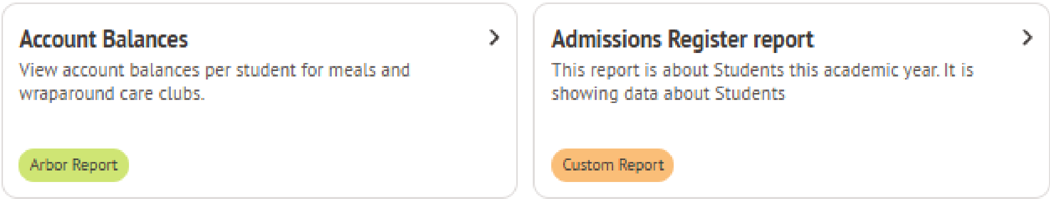
https://support.arbor-education.com/hc/en-us/articles/28229007274269-Templates-Available-in-the-Template-Library

2. Report Library

The Report Library is a centralised space where you can access both built-in Arbor reports and any Custom Reports you have permission to view. The reports here are from different areas with Arbor (Attendance, Behaviour, Assessment, etc), including custom reports that you may have created.

Reporting > Report Library

Build in reports are shown with a Green banner and any custom reports are shown with an Orange banner



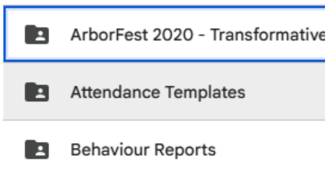
Reports can be found using badges or the search function, created, edited, and shared following the same process outlined on pages 3 and 4.

3. Importing a Report from the ARBOR Help Centre

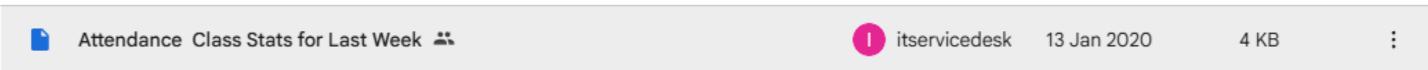
This article contains more Custom Report Writer report templates to download and import

https://support.arbor-education.com/hc/en-us/articles/360024393154-More-Custom-Report-Writer-report-templates-to-download-and-import

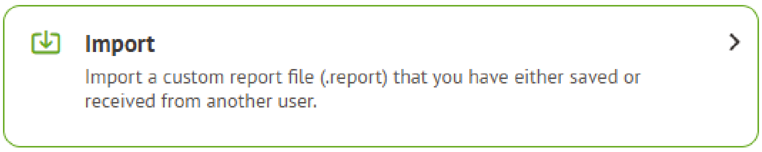
- **Click on the link** above
- Click on the **Google Drive** icon
- If the icon does not work, this is the Google Drive URL https://drive.google.com/drive/folders/17E0IQeb2c2r38uDVLzUVHLAUJrRyrQ9h



- Select the Subject Folder by double clicking (E.g. Attendance Templates)
- Find a report you might want (example below)



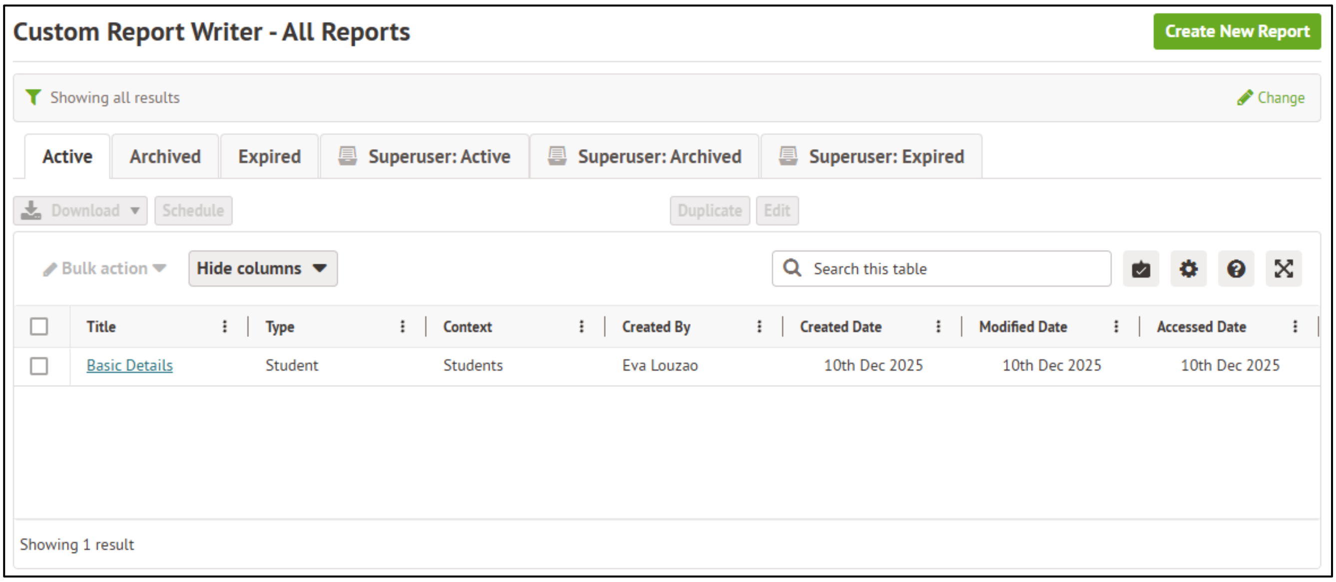
- Click on the **3 dots** on the right
- Click on the **Download** option, the report will then download onto your computer
- Next navigate to **School > Custom Report Writer**
- Click on the **Create New Report** button
- Select the **Import** option
- Click on **Browse**
- Navigate to your downloads folder and select the report template
- Click on the **Import** button
- The report will then run and be added to your Custom Report Writer list



4. Creating a Custom Report

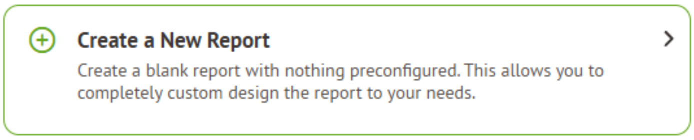
School > Custom Report Writer

When you go to the Custom Report Writer area, you may initially see no reports if none have been created yet. Otherwise, you will see a list of reports you have created or copied from the report template library.

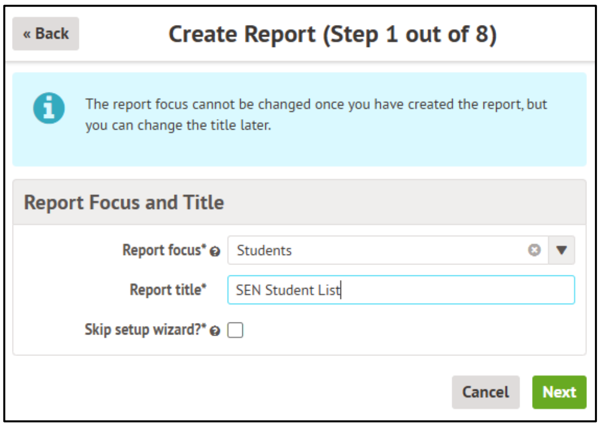


- Click on the green **Create New Report** button in the top right

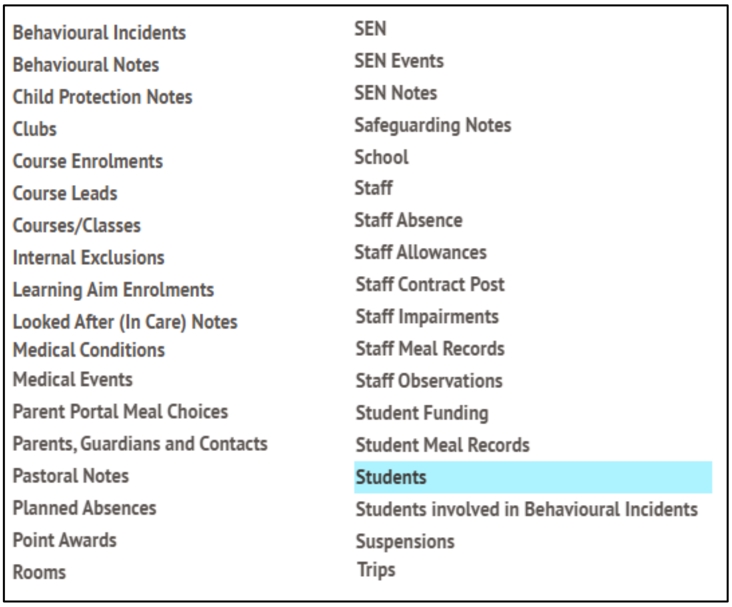
- Click on the **Create a New Report** option



- You will be presented with **Create Report Step 1 of 8** screen (as shown here)



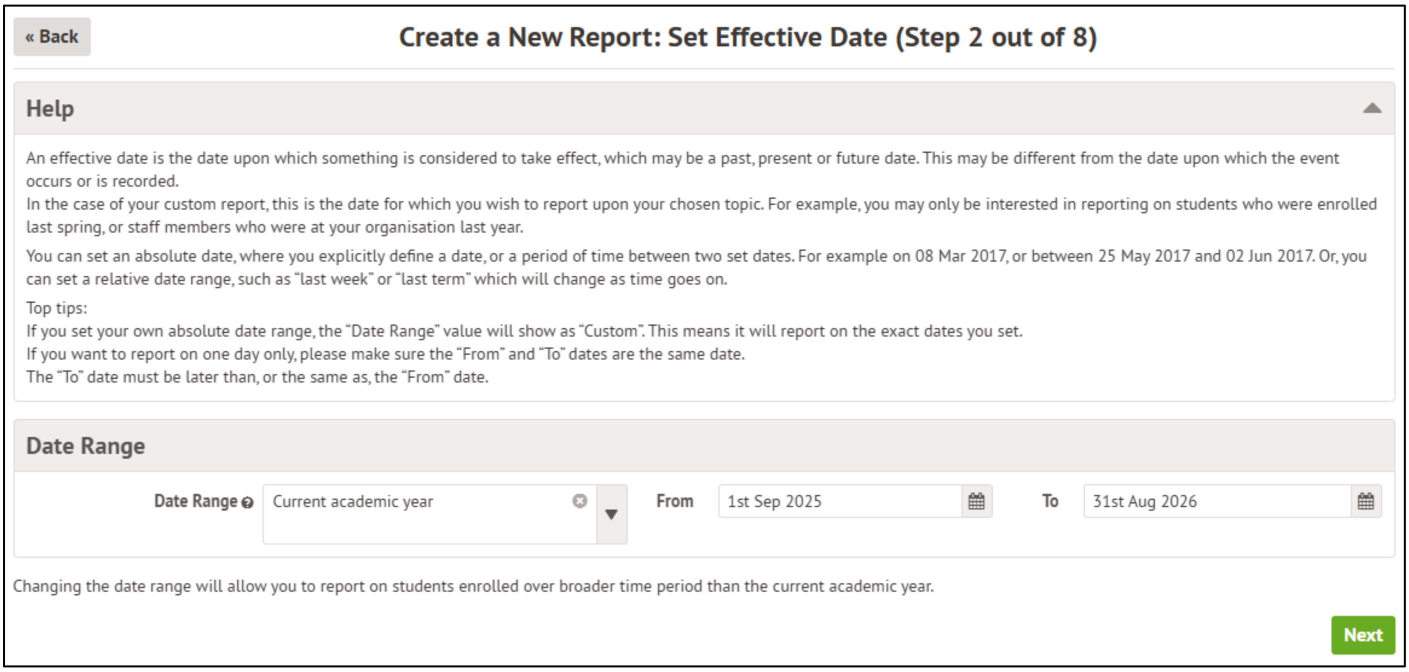
- Select the **Report focus** (a list is shown here) - for this example we will focus on **Students**



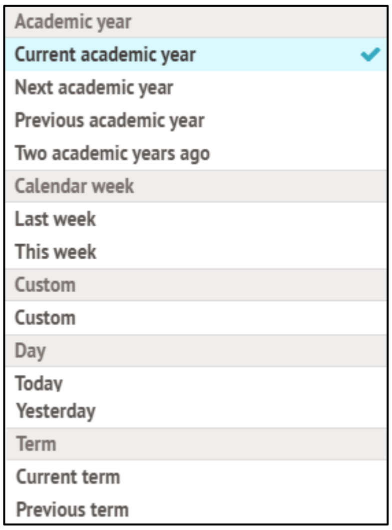
ARBOR Help Centre article
This article contains a link to an Excel document at the bottom, which you can use to reference which report fields are available in each custom report focus. Just click the link to download the file.

https://support.arbor-education.com/hc/en-us/articles/29398027039901-What-report-fields-can-I-use-with-each-report-focus-in-the-custom-report-writer

- Type in the **Report Title**
- Click on the green **Next** button
- You will then be presented with **Create a New Report Step 2 of 8** screen (as shown here)

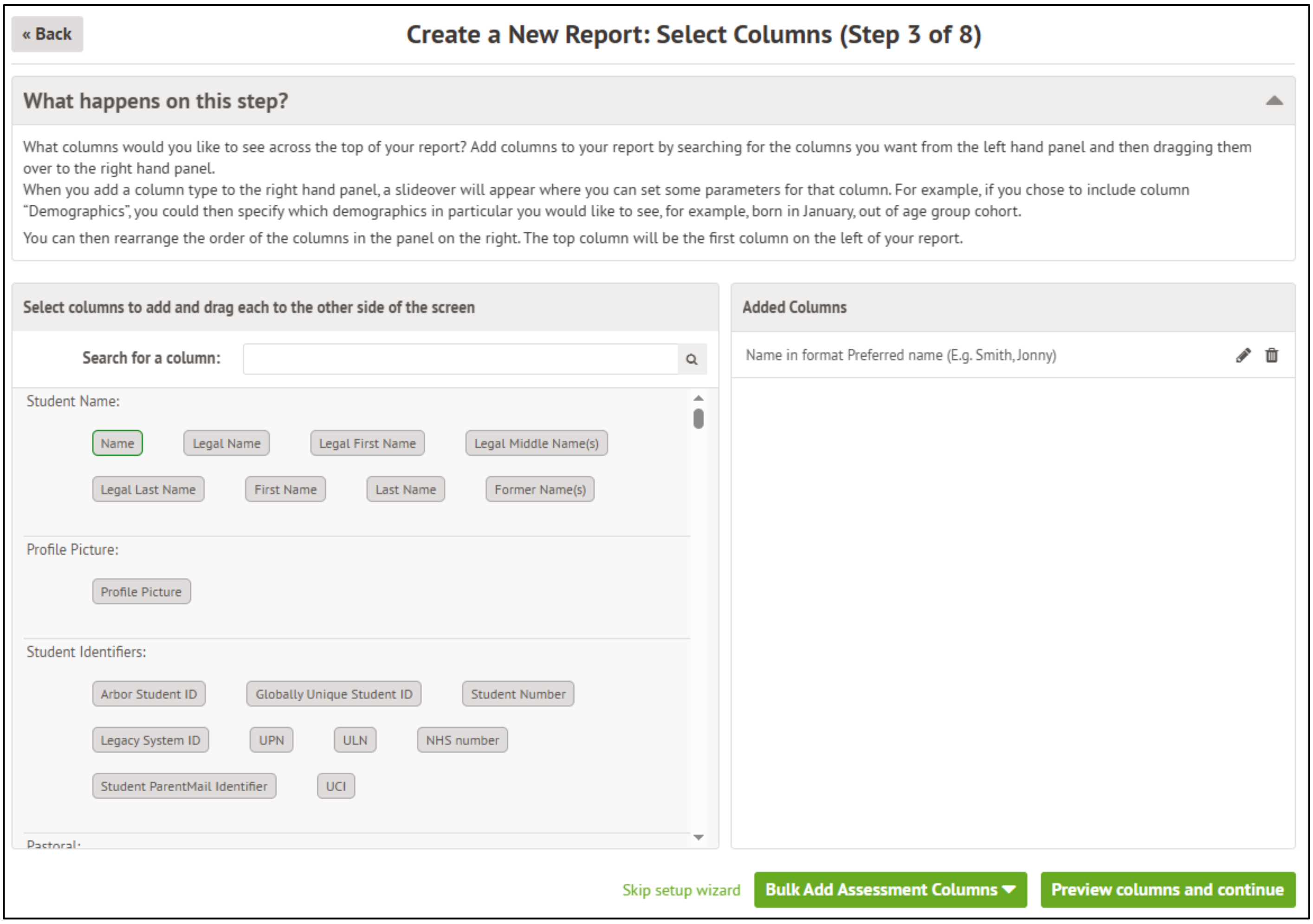


- Make your selection in the **Date Range** field. The default will be pre-set to **Current academic year**. Here is a list of all the options available:



- This is OK if you want to list all students who may have been enrolled in this academic year. If you would like to just see the students who are currently enrolled, change this to **Today**
- Enter in the **From** date
  (the default is the first day of the academic year)
- Enter in the **To** date
  (the default is the last day of the academic year)
- Click on the green **Next** button

- You will then be presented with **Create a New Report Step 3 of 8** screen (as shown here)



This is where you select the column fields you would like in your report. As this report focus is Students (Step 1 of 8), the name of the student is automatically added. You can remove this field if you prefer to display the student name as separate first and last name fields.

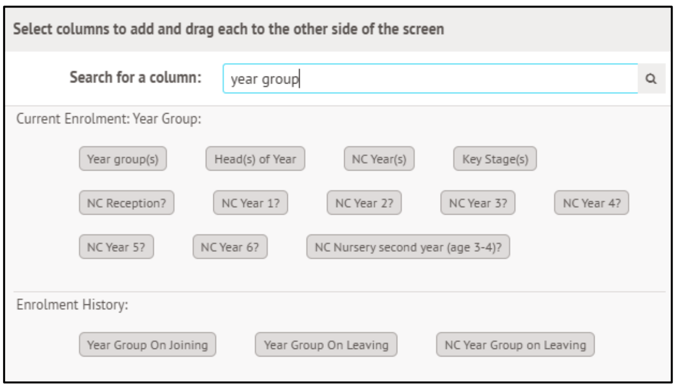
In this example we will be building a report with the following fields:

- Student Name
- Year Group
- Registration Form
- SEN?
- SEN Status
- SEN Need

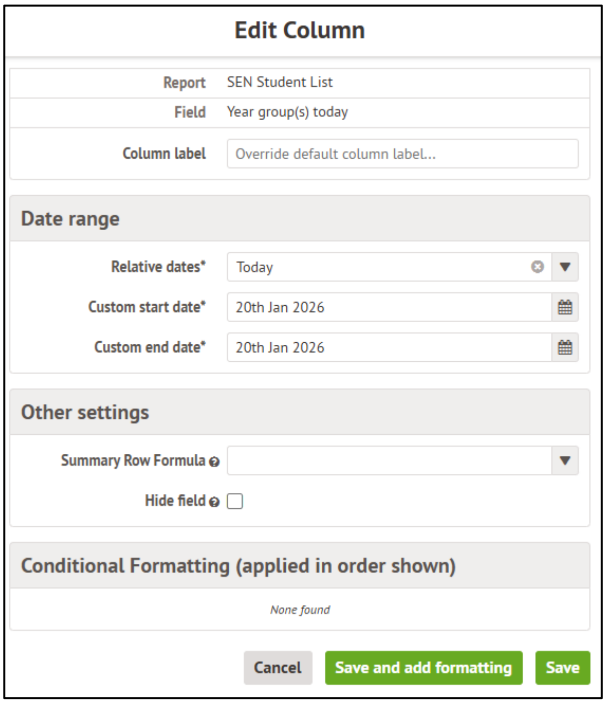
- In the **Search for a column box**, type in the name of the first field (Year Group)

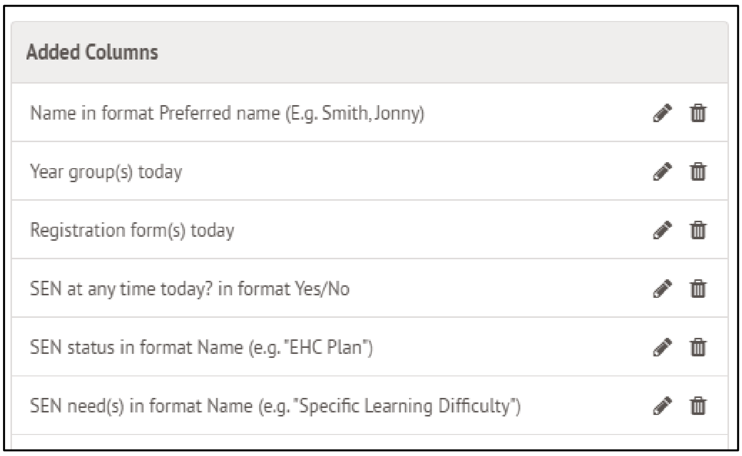
- As you type, the system filters the list and displays any fields matching your text

- **Drag and drop** the Year Group field over to the Added Columns area

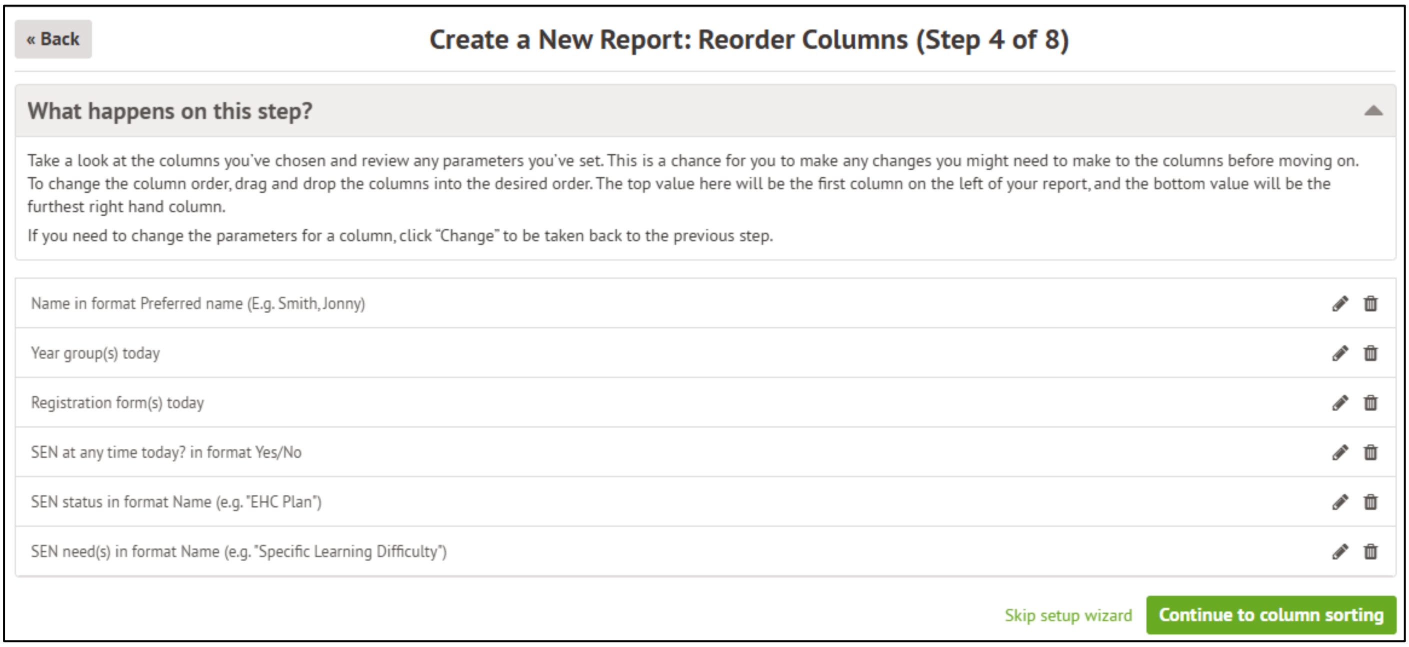


- Change the name of the field if needed in the **Column label** box
- Change any other information, such as dates (if necessary)
- Check the **Format** field is showing the data in the format you want (this field does not show for all fields)
- Click on the green **Save** button
- Continue adding all other fields until you have all the fields you require (as shown below)



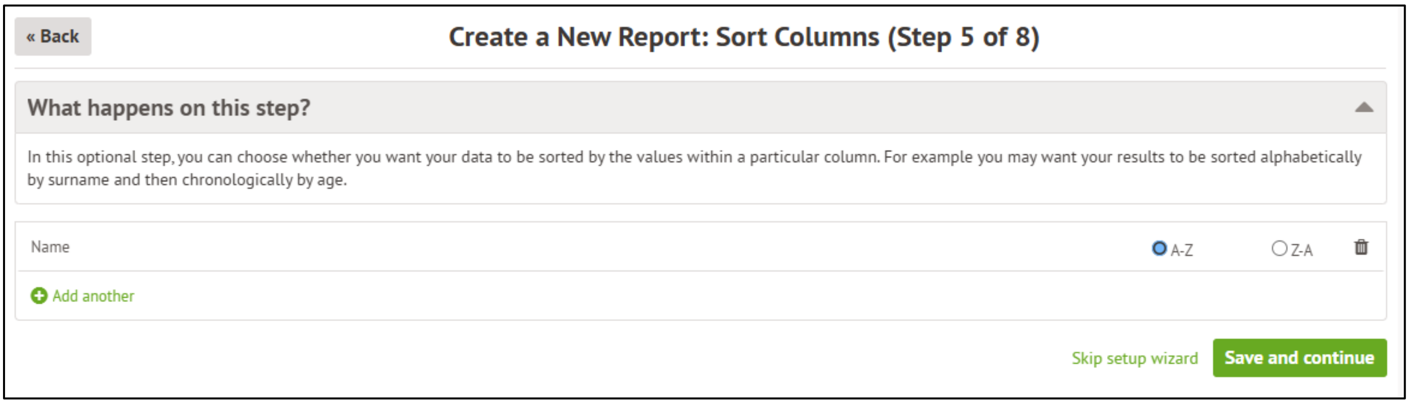


- Click on the green **Preview columns and continue** button
- You will then be presented with **Create a New Report Step 4 of 8** screen (as shown here)



- In this area, you can review your selected columns, reorder them using drag and drop, and edit field names by clicking the pencil icon next to each field.
- Click on the green **Continue to column sorting** button

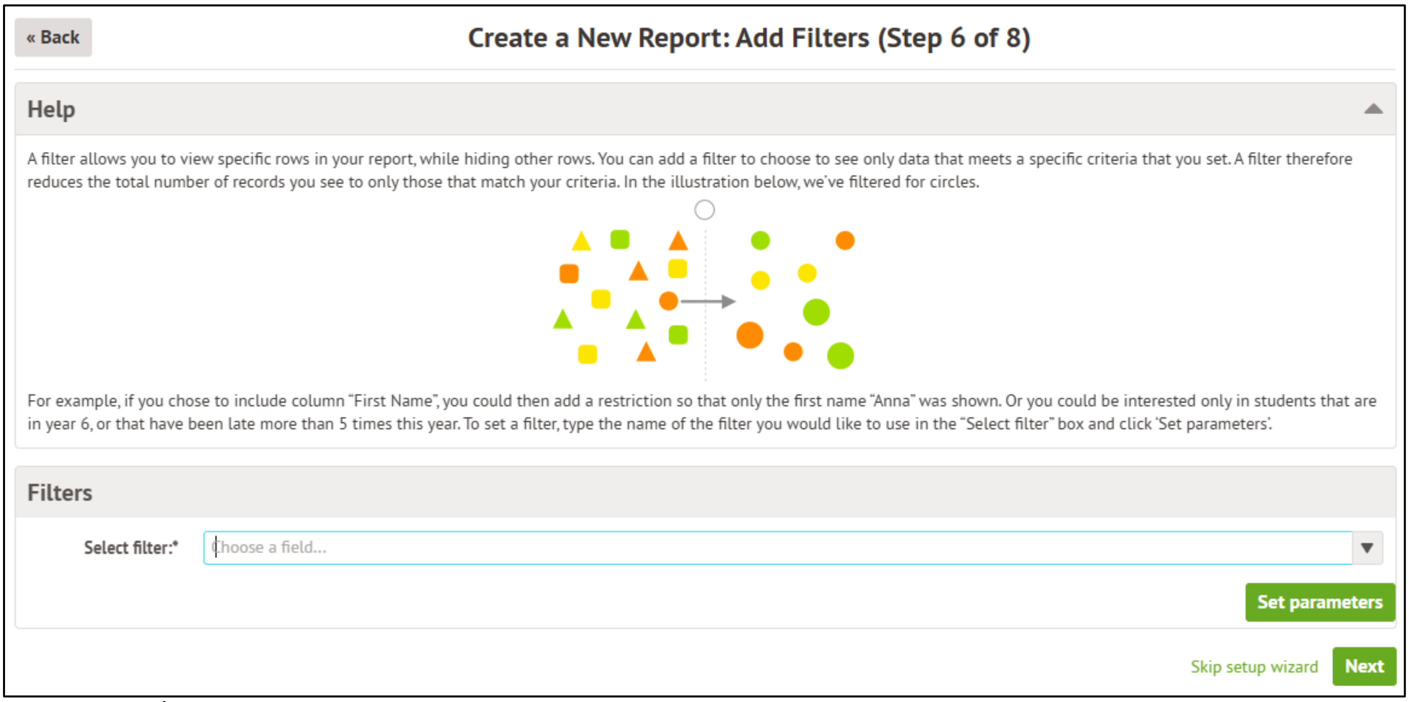
- You will then be presented with **Create a New Report Step 5 of 8** screen (as shown here)



In this **optional step**, you can choose whether you want your data to be sorted by the values within a particular column. For example you may want your results to be sorted alphabetically by surname and then chronologically by age.

- Click on the green **Save and continue** button

- You will then be presented with **Create a New Report Step 6 of 8** screen (as shown here)



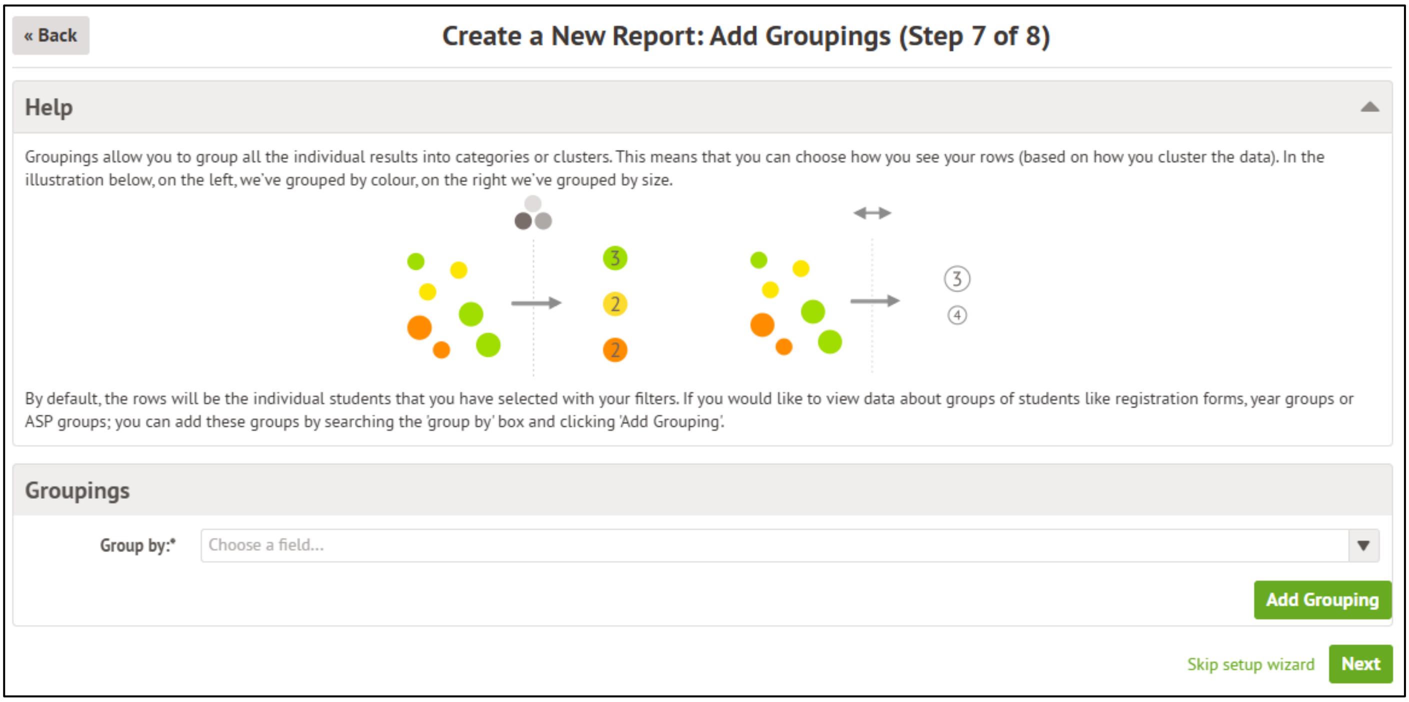
In this **optional step**, you can choose to add a filter. Filters can only be applied to columns you have selected.

Example filter:

- SEN? – equals Yes
- Year Group – is one of Rec, Y1 and Y2

- Click on the green **Next** button

- You will then be presented with **Create a New Report Step 7 of 8** screen (as shown here)



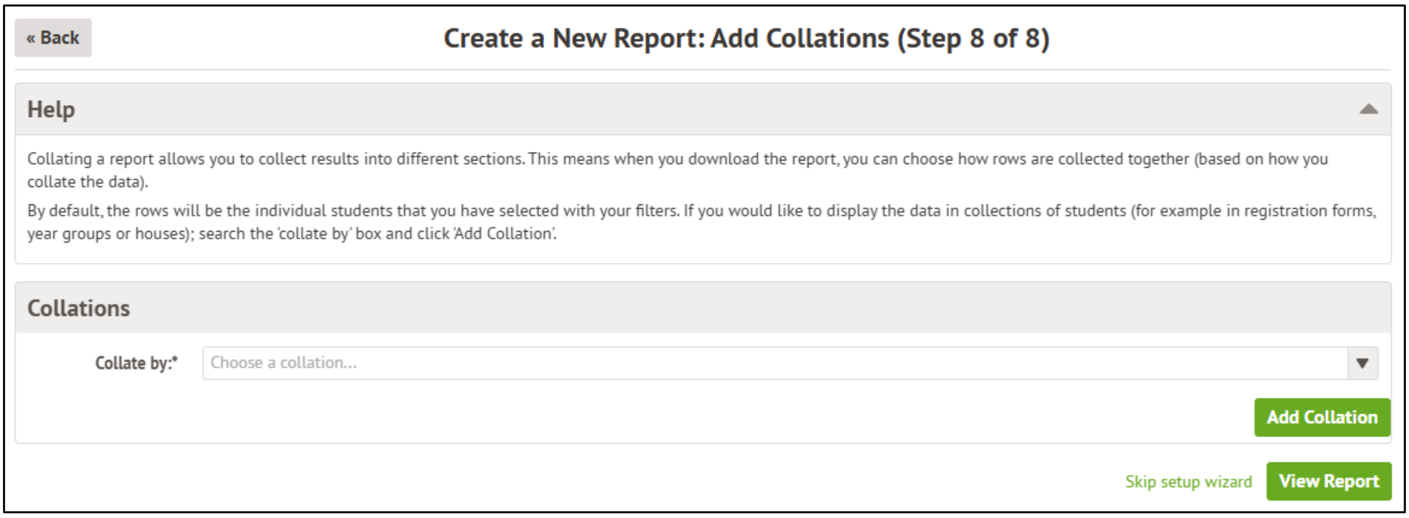
In this **optional step**, you can choose to add a grouping.

Example groupings:

- Year group
- Registration form

- Click on the green **Next** button

- You will then be presented with **Create a New Report Step 8 of 8** screen (as shown here)



Collating a report allows you to collect results into different sections. This means when you download the report, you can choose how rows are collected together (based on how you collate the data).

By default, the rows will be the individual students that you have selected with your filters. If you would like to display the data in collections of students (for example in registration forms, year groups or houses), search the **'collate by'** box and click **'Add Collation'**.

- Click on the green **View Report** button

5. Editing a Custom Report

School > Custom Report Writer

To modify a custom report, you must first run the report. Any changes you make will be saved and retained unless you revert the report to its original settings.

- **Click on the custom report** and it will run and display the results
- Click on the grey **Edit** button at the top of the screen

Edit | Duplicate | Delete

- **Make the changes** you require
- Click on the green **Save & View Report** button

6. Creating a Chart from a Custom Report

The **Tables to Charts** feature in Arbor allows users to create and download visual representations of data directly within the platform, enhancing data analysis and presentation capabilities. Users can select data ranges, choose from various chart types, and customise their visualisations before exporting them as PNG files. The Tables to Charts feature gives you the ability to create data visualisations directly in Arbor, reducing the need to export your data out of Arbor for further analysis.

- **Click on the custom report** and it will run and display the results
- Next you need to **select the data you want to visualise**.

Hide columns ▾ Search this table

Name	Max Participants	Number of Active Club Memberships this academic year
After School Care (2025/2...		11
After School Club (2025/2...	30	0
Art Club (2025/2026)	20	10
Drama Club (2025/2026)	60	7
Football Club (2025/2026)	30	10
	Average 35.0	Average 7.6

This can be done several ways:

- Highlight and drag using your mouse
- Use CTRL to highlight more than one column
- Use the keyboard by holding the Shift and Arrow Keys
- To Select all data, hold the CTRL and A key

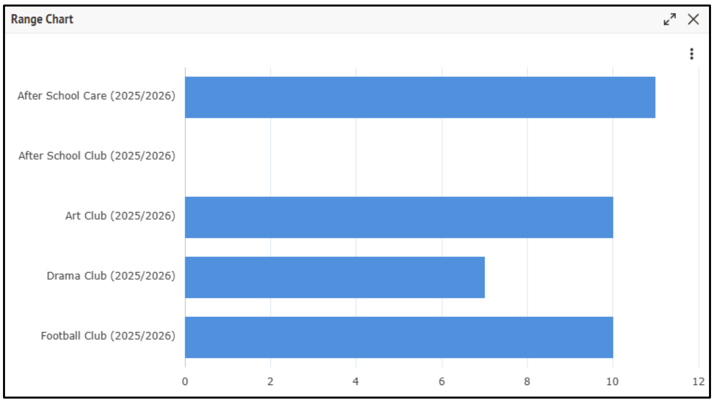
- Once you have selected your data, **right-click** and choose **Chart Range**. (If this option is greyed out, it means the selected data cannot be charted.)

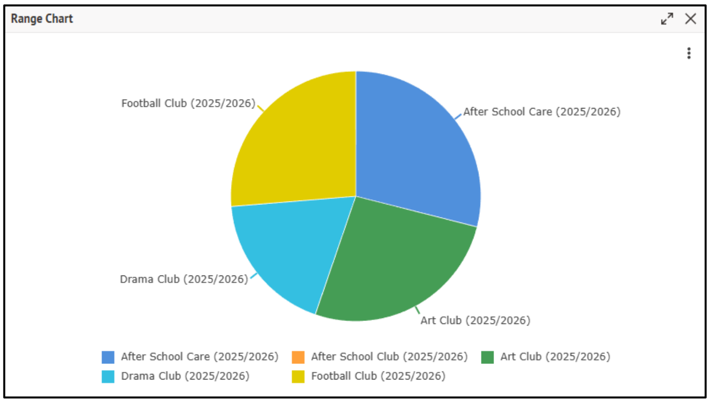
  You have a variety of charts to choose from, as shown here >

Column
Bar
Pie
Line
Area
X Y (Scatter)
Statistical
Combination

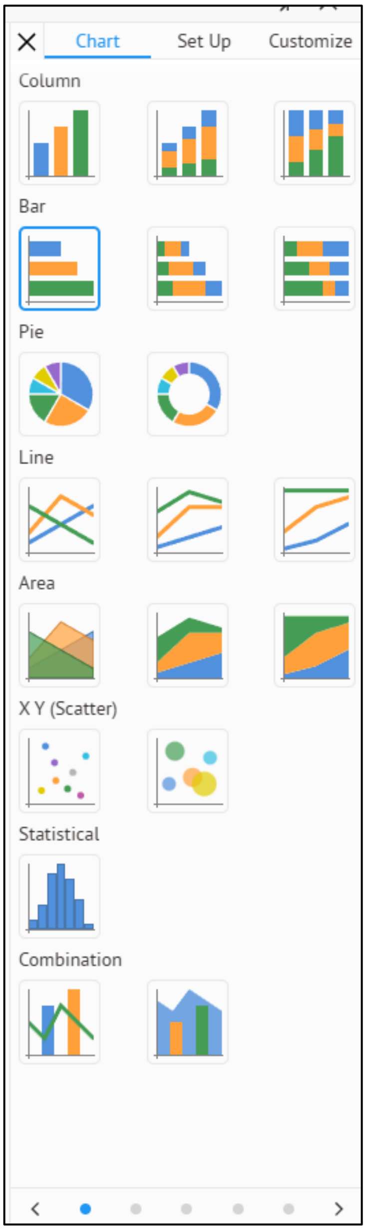
- Select the **chart type** (e.g. Bar or Pie)
- Select the **chart sub type** (e.g. Grouped)

- The chart will then display (as shown here)





The chart can be resized to make it easier to view, just click on the bottom right corner and drag or make the chart full screen by clicking on the double arrow icon



When the chart is full screen, there is a **menu icon** ⋮ (3 dots) in the top right.

- Click on this **menu icon** and select **Edit Chart**
- You can now select a different chart if required
- The dots at the botton will allow you to switch between different colours
- The **Setup menu**, will allow you to change the Categories and Series being displayed
- The **Customise menu**, will allow you to add a Title, choose the Font and Size of the text or to enable the Legend, etc
- Once you have finished formatting your graph, click on the **Menu icon**
- Click on the **Download Chart** option

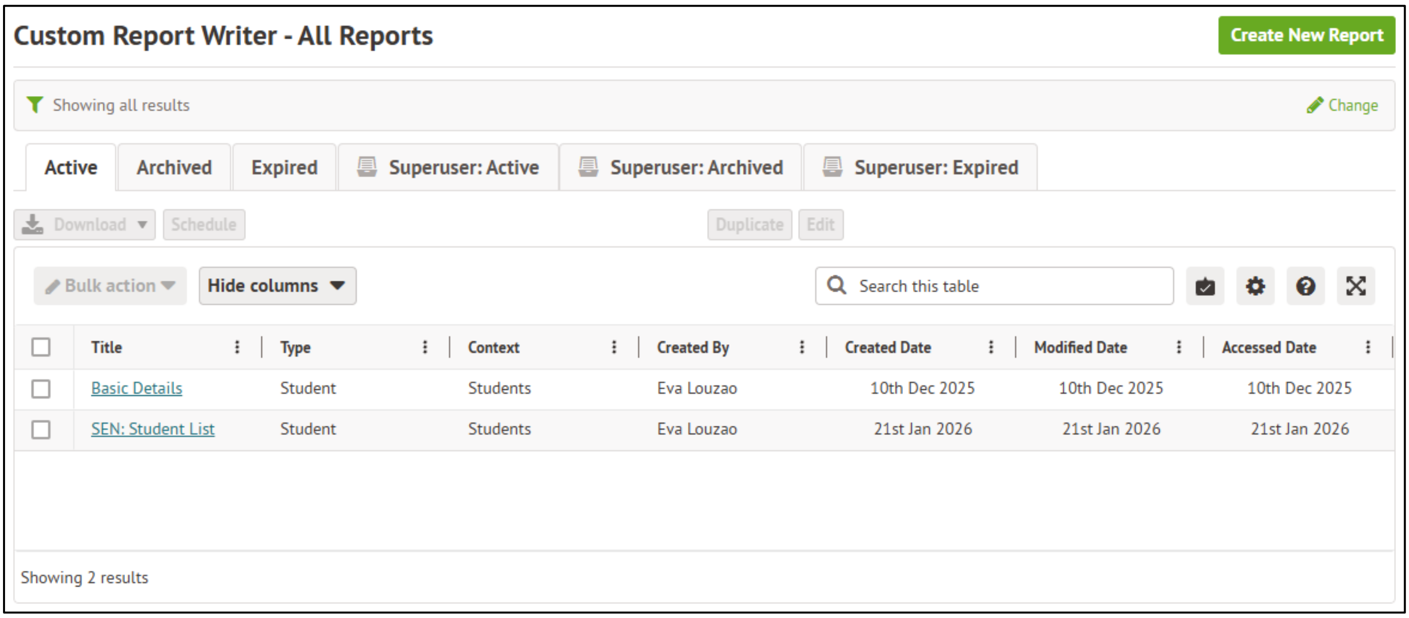
- This exports as a **PNG** file format, which means it is ready to be added to reports and / or presentations.

7. Duplicating Reports

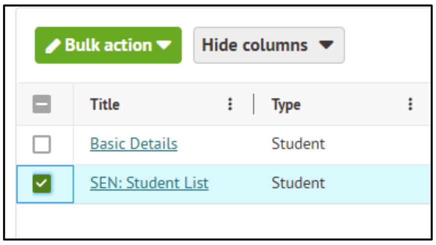
There are a couple of ways to duplicate a report. Duplicating a report saves time by eliminating the need to create the report from scratch and reapply all the formatting used in the original report.

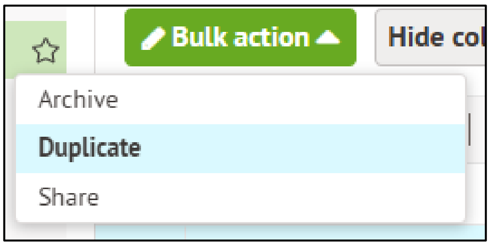
School > Custom Report Writer

In this example, we have a SEN: Student List report, which we are going to duplicate for use with listing the Pupil Premium students

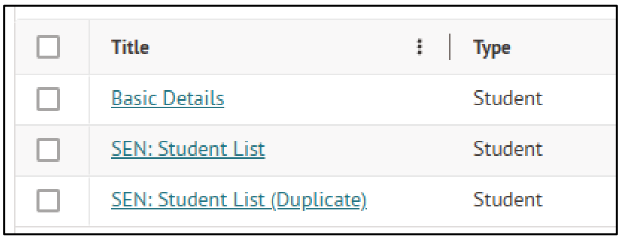


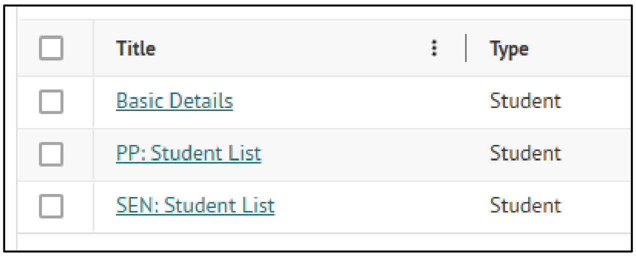
- Click on the **tick box to the left** of the report name
- Click on the green **Bulk Action** button and select the **Duplicate** option





- The report will then be duplicated (as shown here)
- You can now click on the report and make the changes to the Report Name, change the Fields, etc.
- Once saved, the report will be listed with the new name



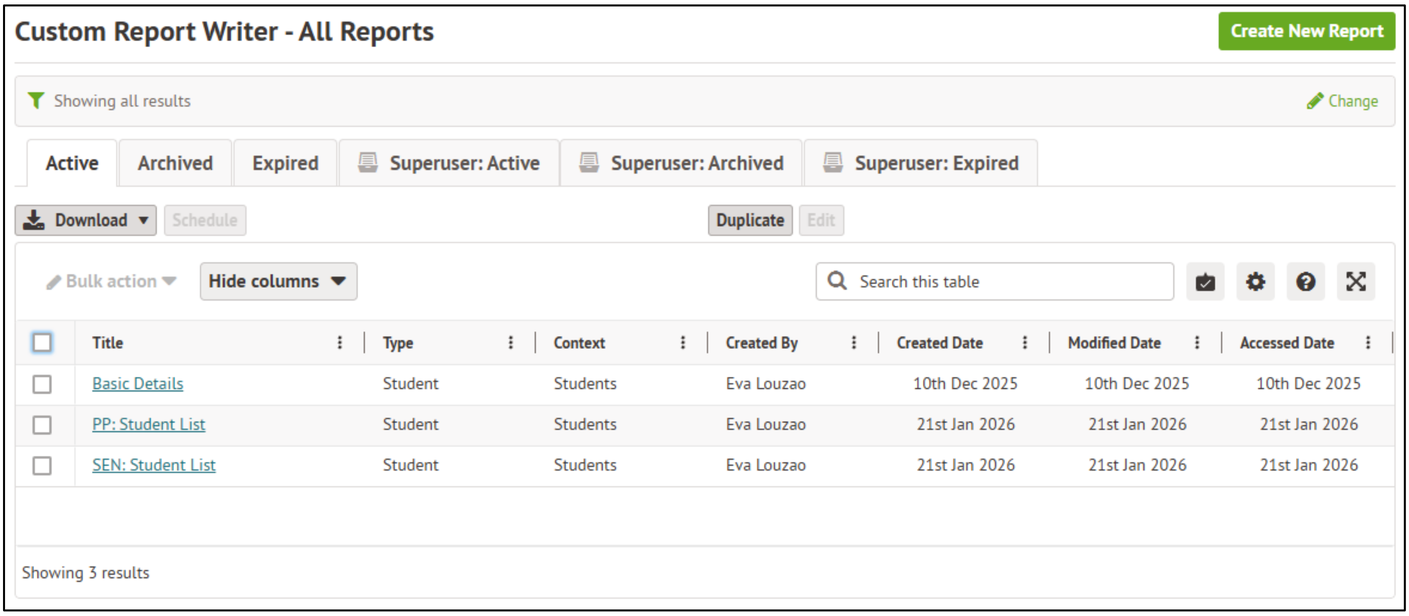


8. Sharing Reports

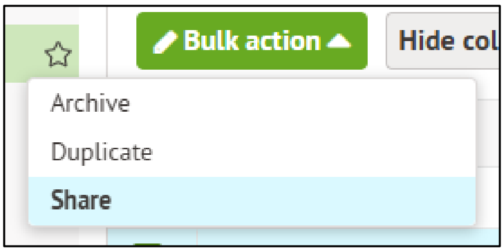
When you create a custom report, it can only be viewed and run by you. If you want other users to access the report, you must share it with them.

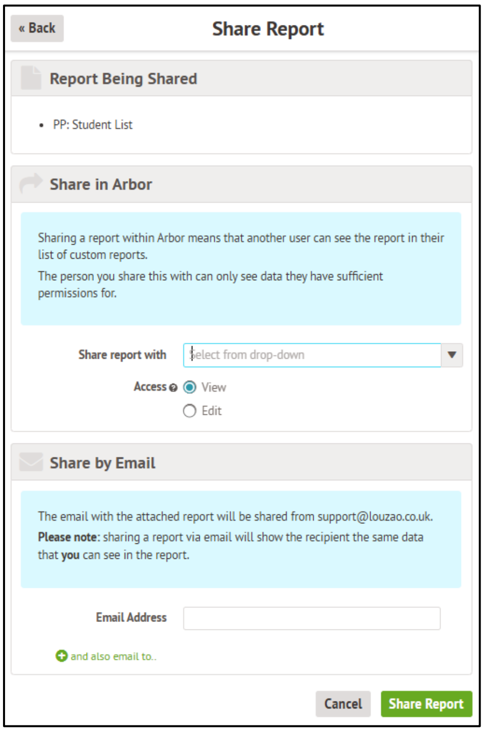
Please note that if the report contains sensitive information (for example, safeguarding or child protection data), the users you share it with must also have the appropriate permissions to view that data. Otherwise, they will not be able to run the report.

School > Custom Report Writer



- Click on the **tick box to the left** of the report name
- Click on the green **Bulk Action** button and select the **Share** option





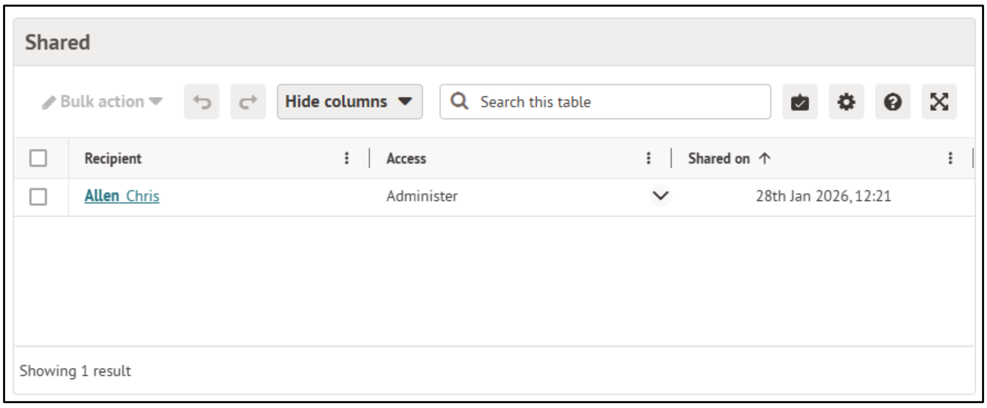
- Click on the drop down arrow on the **Share report with** field
- Select the **member of staff** from the list
- Choose the **Access** you want them to have **View or Edit**
- Click on the green **Share Report** button
- The staff member will then be notified via the Notifications Bell that you have shared a report with them. They can access the report by going to **School > Custom Report Writer**
- Once shared, an Icon appeared next to the report informing you that it has been shared

9. Changing Access or Unsharing a Custom Report

If you wanted to remove or change the status of a shared report, you can do this by:

School > Custom Report Writer

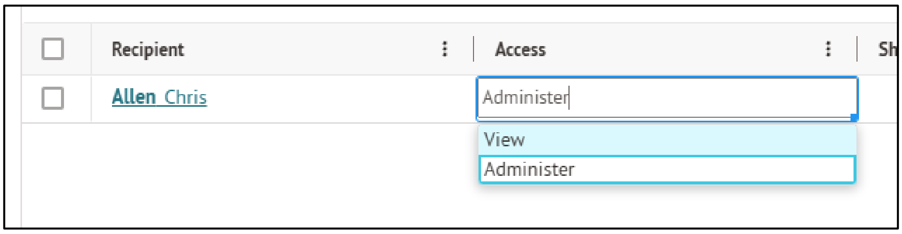
- Click on the **custom report** and it will run and display the results
- Click on the **Report History** option from the left menu
- Scroll down to the **Shared** area



- **Tick the box** to the left of the staff member
- Click on the green **Bulk Action** button
- Select the **Unshare** option

Or if you did not want to Unshare the report but wanted to change their Access:

- Click on the **Access arrow** and change it to View

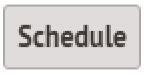


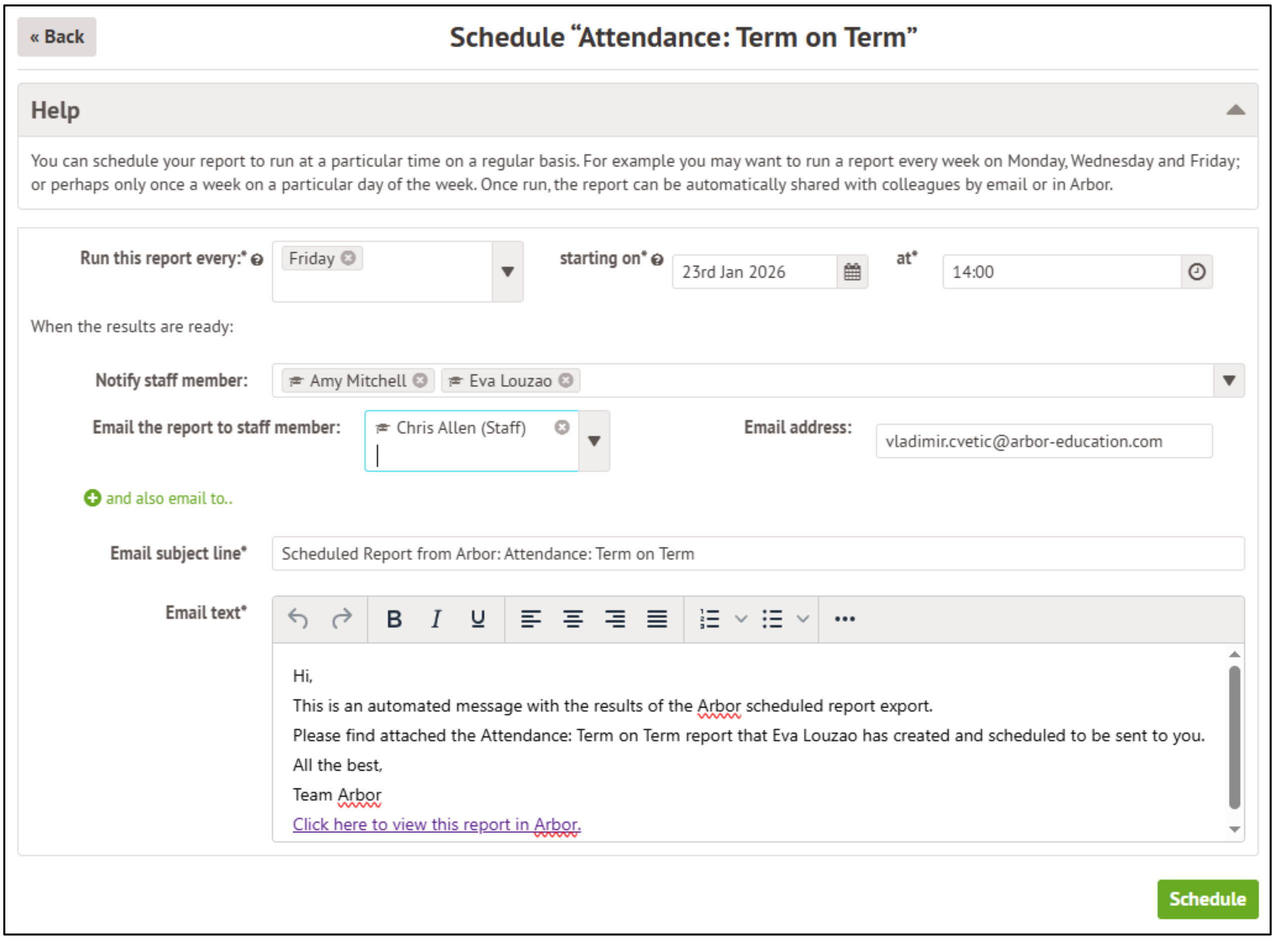
10. Scheduling Custom Reports

Arbor allows you to schedule reports using the custom report writer. Users can set up reports to run at a specific time.

School > Custom Report Writer

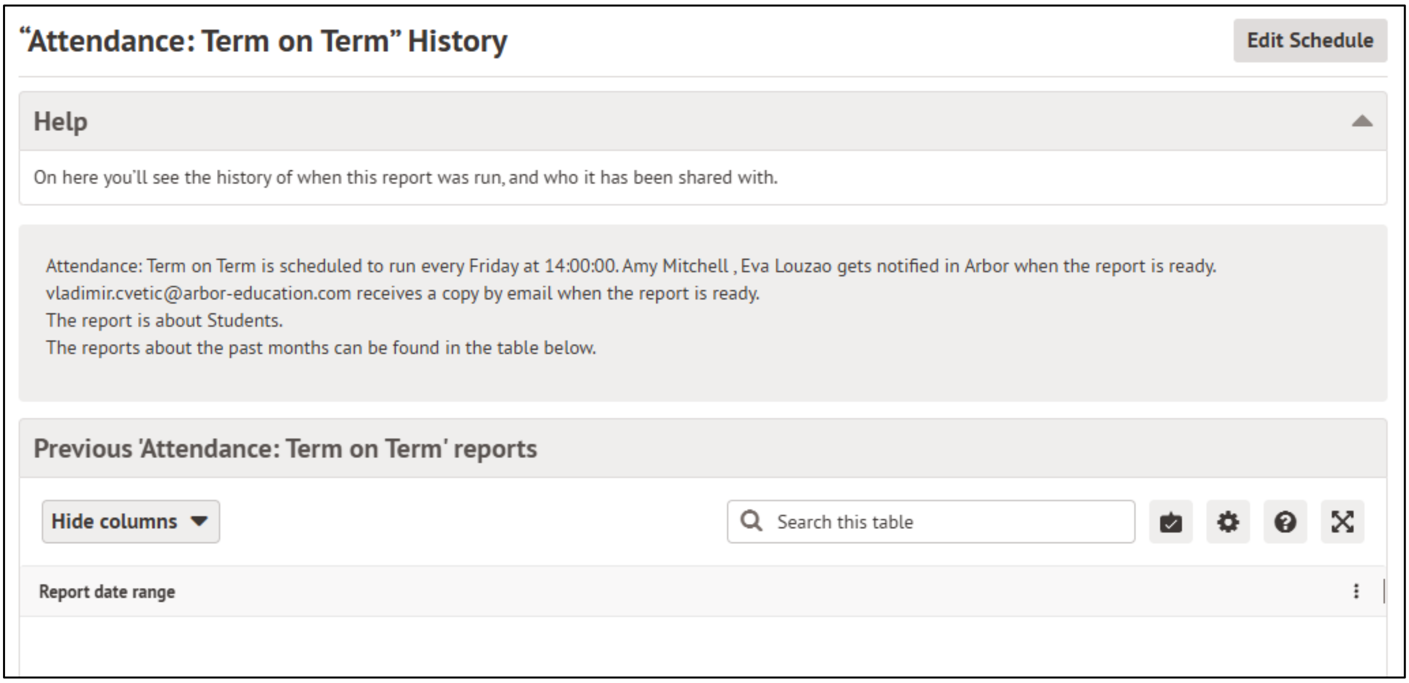
- Click on the **custom report** and it will run and display the results
- Click on the **Schedule** button at the top of the page





- In the **Run this report every** field, select the day or days you want your report to run
- In the **Starting on** field, select the first date for the report to run
- In the **at** field, select the time for the report to run
- Select which staff you want to notify every time this report is run in the **Notify staff member** field
- If you want to also email staff, select the staff in the **Email the report to staff member** box (the email address will be picked up from the staff's profile)
- Change the **Email Subject line** (if necessary)
- Change the **Email text** (if necessary)
- Click on the green **Schedule** button

- You will then be shown the Report History screen for this report, where you can view the history of every time this report runs and who it has been shared with



Appendix: Creating a custom report to export assessment data

The following steps are for schools setting up a custom report to download assessment data from Arbor, that will then be copied into a spreadsheet for analysis. The instructions are for a school using the BD EYFS or KS1-2 marksheet setup in Arbor.

If you are using a different set of marksheets you will need to ensure the columns within the custom report are in the same order as in your analysis spreadsheet. You also need to ensure the field options are the same, e.g. if your Sex field is expecting M/F, you need to change the format of this column to M/F – see below.

If you are just creating the custom report to export the data and analyse in Excel (i.e. not importing into another spreadsheet), then the format of the columns is not as important.

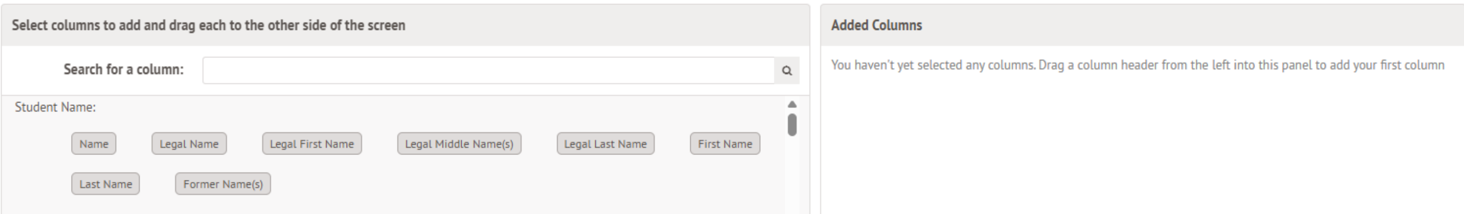
Creating the first report

- Go to **School > Custom Report Writer**
- Click on **Create New Report**
- Click on **Create a New Report**
- Enter the **Report title** and click **Next**
- Change the date range to **Today**, click **Next**

1. Adding contextual columns

On the left are all the possible contextual columns you can include in your report, and on the right are columns that will be included. By default '**Name**' is included but in surname, firstname in one field. We need them in separate fields.

- Click on the bin icon next to **Name in format Preferred name (e.g. Smith, Jonny)**
- Find **last name** column from left and drag to right of screen



- You will be presented with an **Edit Column** slide over. We don't need to change anything for this column, so click **Save**
- Repeat for **first name**

- Repeat for the following contextual columns (with edits to be made if applicable) – use the search box to locate the columns. They need to be added in the order shown:

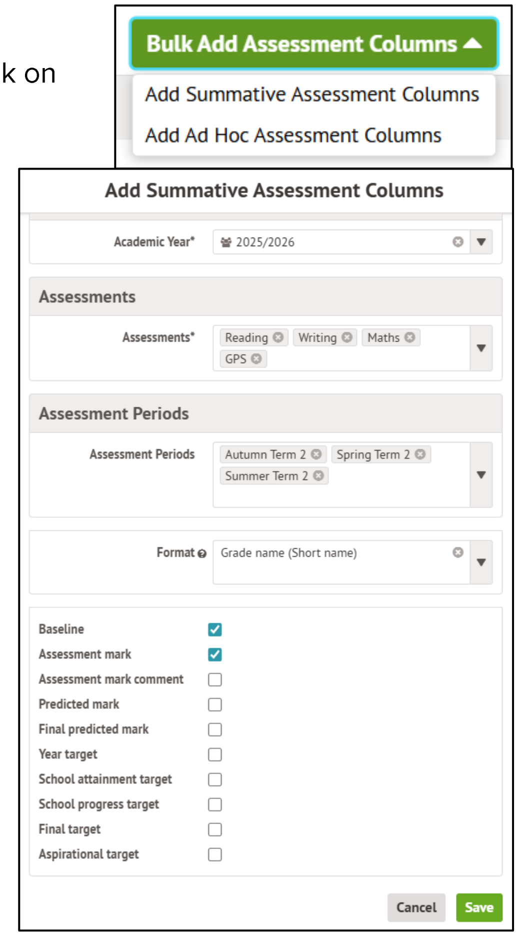
Column	Make changes in edit slide over
Last Name (already added above)	No changes
First Name (already added above)	No changes
Registration Form	Change Column label to **Class** (optional)
Sex	Change format (drop-down) to **Abbreviation (M, F)**
Date of Birth	Change format (drop-down) to **dd/mm/yyyy**
EAL?	Change column label to **EAL**

	Change format (drop-down) to **Y/N**
Ethnicity	Change format (drop-down) to **Code (“CSNG”, “MWBA”)**
Ever 6 FSM?	Change format (drop-down) to **Y/N**
Looked After (In Care)?	Change format (drop-down) to **Y/N**
SEN Status	Change format (drop-down) to **DfE Code (“S”, “K”)**
Entry Date (First)*	Change format (drop-down) to **dd/mm/yyyy**

* If you have pupils who have left and then returned to school, you might wish to select Entry Date (Most Recent) instead.

2. Adding assessment marks

- Once all the contextual columns have been added as above, click on **Bulk Add Assessment Columns > Add Summative Assessment Columns**
- In the Assessments drop down, select the appropriate assessments you want included in your report, e.g.:
    - Reading
    - Writing
    - Maths
    - GPS



Note: Select the assessments in the order you want them to appear in the report.

- Keep the assessment periods as ‘**All available assessment periods**’
    - Check the column order on the spreadsheet you are importing your data into – if it just wants one term of data, then just select the relevant term
- In the **Format** drop-down, select ‘**Grade name (short name)**’
- Tick **Baseline** (if you want baseline grades included) and **Assessment mark**
- Click **Save**
- Click **Preview columns and continue**

3. Adding filter (to specify the year group)

- Check the columns are in the correct order – you can reorder them at this stage if you wish.
- Click on **Continue to column sorting**
- No sorting is needed, so click **Save and continue**

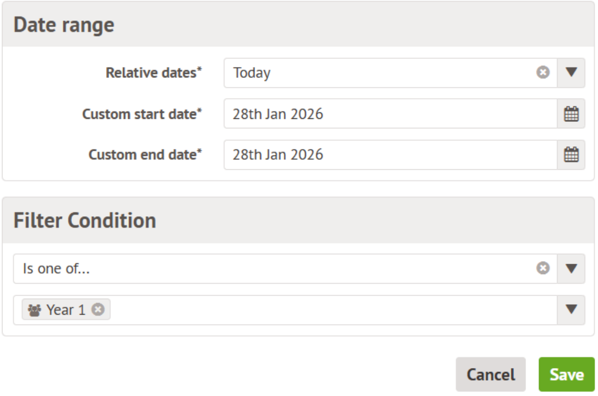
At the filtering stage:
By default, the report will pick up all students, from all year groups. We want a report for a single year group, e.g. year 1, so need to add a filter.

- On the **Filters** drop-down menu select **Year group(s)** and click **Set parameters**
- On the slide-over change **Relative dates** to **Today** (if you just want current pupils)

- Change the filter **condition** so it reads **‘is one of... 1’** (for year 1, ‘6’ for year 6 etc)
- Click **Save**
- Click **Next**

- No **groupings** are needed, so click **Next**

- No **collations** are needed, so click **View Report**



You will now see a copy of the report – check it is showing the pupils you are expecting, and the data you are expecting.

If the report needs amending you can click on **Edit**, where you can review the columns and amend as needed.

4. Downloading the data

- On the **Download** drop-down, click on **CSV** to download the data
- Data can then be copied and pasted into an analysis spreadsheet.

Creating the remaining reports

When creating the remaining reports, you can duplicate an existing report and edit as needed.

- Open the report you have just created.
- Click on **Duplicate**
- Click on **Edit**
- **Update** the name of the report
- Remove any columns not needed (e.g. for Year 3 – 6 delete the Date of birth column)
- Click on **pencil** next to filter, remove year group currently in the filter and **add** the new year group, **save** filter
- Click on **Save and view report**

Repeat steps above as needed.