



CUSTOM REPORT WRITER GUIDE

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Permissions

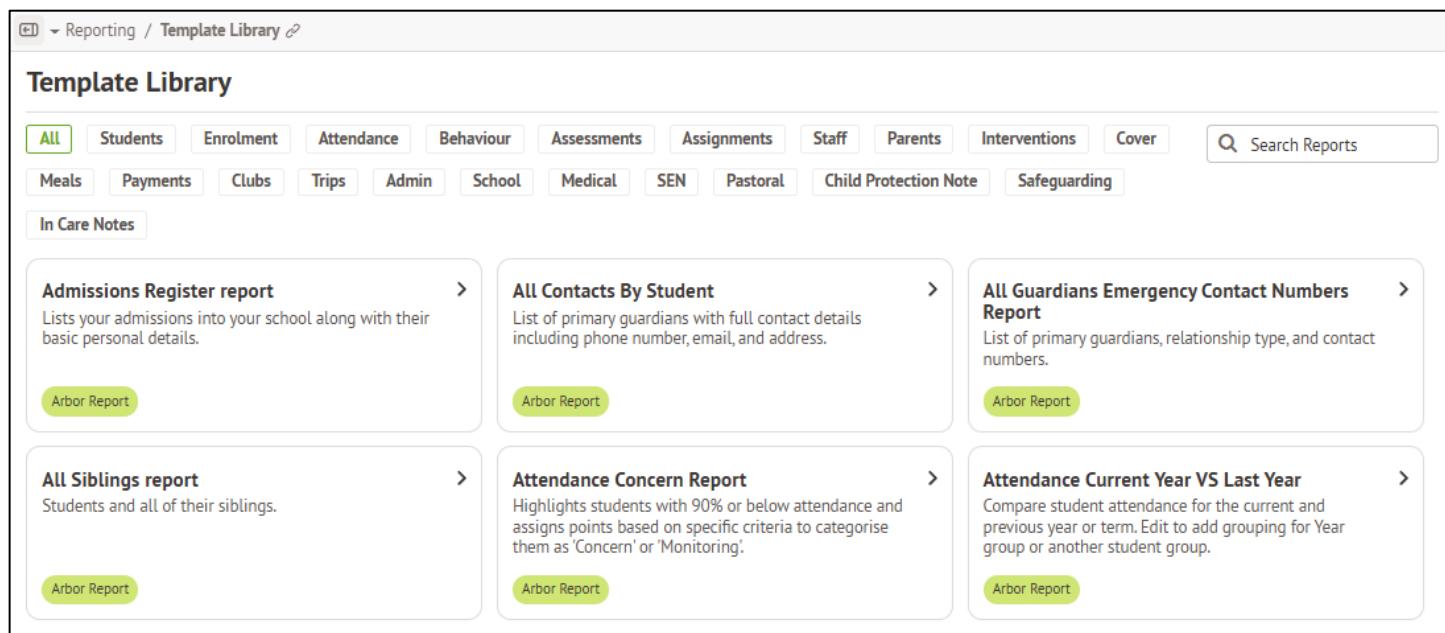
Access to Custom Report Writer reports is determined by user permissions. Users can only view data they have permission for, and fields may be redacted if permissions are lacking. Sharing reports within the MIS or via email respects the sender's permissions, affecting what recipients can see. Superuser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

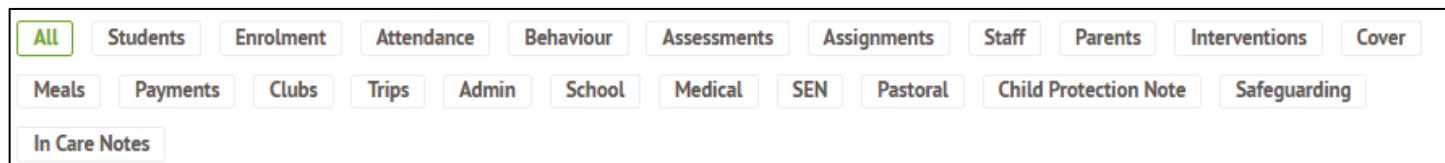


The screenshot shows the 'Template Library' page with a header bar containing buttons for 'All', 'Students', 'Enrolment', 'Attendance', 'Behaviour', 'Assessments', 'Assignments', 'Staff', 'Parents', 'Interventions', 'Cover', 'Meals', 'Payments', 'Clubs', 'Trips', 'Admin', 'School', 'Medical', 'SEN', 'Pastoral', 'Child Protection Note', and 'Safeguarding'. Below the header is a search bar with a magnifying glass icon and the placeholder 'Search Reports'. A 'In Care Notes' button is also present. The main content area displays six report templates in cards:

- Admissions Register report**
Lists your admissions into your school along with their basic personal details.
[Arbor Report](#)
- All Contacts By Student**
List of primary guardians with full contact details including phone number, email, and address.
[Arbor Report](#)
- All Guardians Emergency Contact Numbers Report**
List of primary guardians, relationship type, and contact numbers.
[Arbor Report](#)
- All Siblings report**
Students and all of their siblings.
[Arbor Report](#)
- Attendance Concern Report**
Highlights students with 90% or below attendance and assigns points based on specific criteria to categorise them as 'Concern' or 'Monitoring'.
[Arbor Report](#)
- Attendance Current Year VS Last Year**
Compare student attendance for the current and previous year or term. Edit to add grouping for Year group or another student group.
[Arbor Report](#)

Searching for Report Template

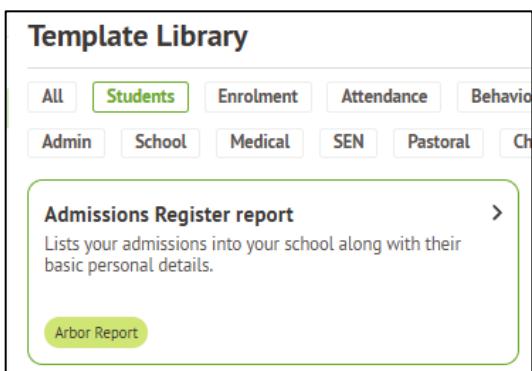
There are a couple of ways to search for a report template. You can use the badges shown below to browse by subject, or use the **Search Reports** function to filter by name.



The screenshot shows the search interface for report templates, featuring the same header and badge buttons as the 'Template Library' page. A 'In Care Notes' button is also present. The main content area is currently empty, indicating no search results.

Details of Report Templates

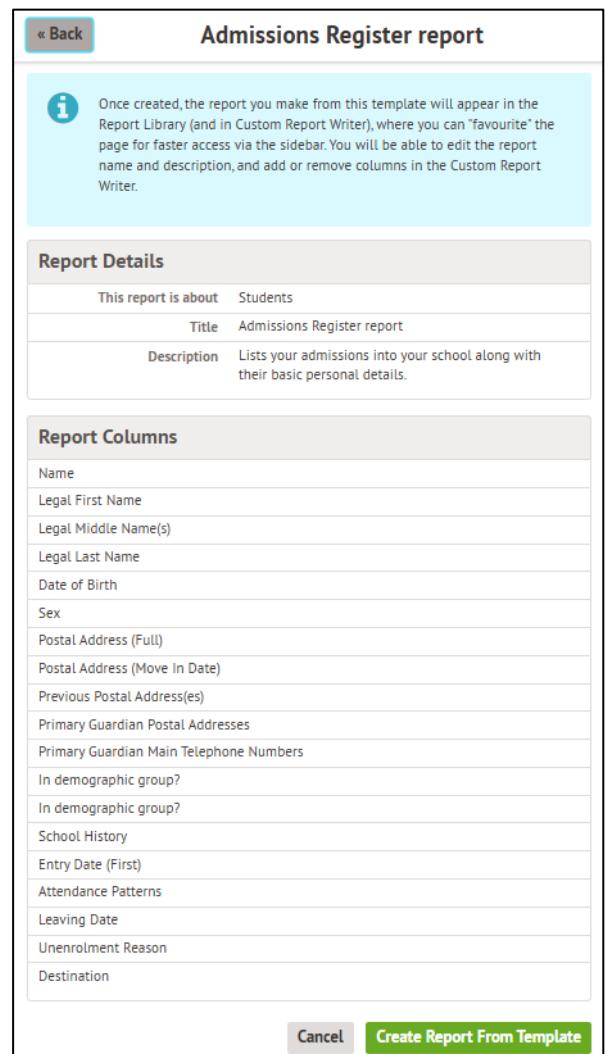
- **Click on a report template**, for this example we are clicking on the Admissions Register report template



The screenshot shows the 'Template Library' interface. At the top, there are several tabs: All, Students (which is selected and highlighted in green), Enrolment, Attendance, Behavior, Admin, School, Medical, SEN, Pastoral, and Ch. Below these tabs, a list of report templates is displayed. One template, 'Admissions Register report', is highlighted with a green border. The description for this template is: 'Lists your admissions into your school along with their basic personal details.' At the bottom of the list is a green button labeled 'Arbor Report'.

- 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)



The screenshot shows the 'Admissions Register report' details slide out. At the top right is a 'Back' button and the title 'Admissions Register report'. Below this is an information icon with a message: 'Once created, the report you make from this template will appear in the Report Library (and in Custom Report Writer), where you can "favourite" the page for faster access via the sidebar. You will be able to edit the report name and description, and add or remove columns in the Custom Report Writer.' The slide out is divided into sections: 'Report Details', 'Report Columns', and buttons at the bottom.

This report is about	Students
Title	Admissions Register report
Description	Lists your admissions into your school along with their basic personal details.

Name
Legal First Name
Legal Middle Name(s)
Legal Last Name
Date of Birth
Sex
Postal Address (Full)
Postal Address (Move In Date)
Previous Postal Address(es)
Primary Guardian Postal Addresses
Primary Guardian Main Telephone Numbers
In demographic group?
In demographic group?
School History
Entry Date (First)
Attendance Patterns
Leaving Date
Unenrolment Reason
Destination

Buttons at the bottom: 'Cancel' and 'Create Report From Template'.

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

Account Balances

View account balances per student for meals and wraparound care clubs.

Admissions Register report

This report is about Students this academic year. It is showing data about Students

Arbor Report

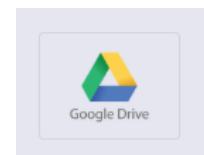
Custom Report

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>

ArborFest 2020 - Transformative

Attendance Templates

Behaviour Reports

Attendance Class Stats for Last Week

itservicedesk 13 Jan 2020 4 KB

- 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

Create New Report

Import

Import a custom report file (.report) that you have either saved or received from another user.

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.

Custom Report Writer - All Reports								Create New Report
T Showing all results								Change
Active Archived Expired Superuser: Active Superuser: Archived Superuser: Expired								
Download Schedule Duplicate Edit								
	Bulk action	Hide columns						
	Title	Type	Context	Created By	Created Date	Modified Date	Accessed Date	
<input type="checkbox"/>	Basic Details	Student	Students	Eva Louzao	10th Dec 2025	10th Dec 2025	10th Dec 2025	
Showing 1 result								

- 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**

Create a New Report

Create a blank report with nothing preconfigured. This allows you to completely custom design the report to your needs.

Report Focus and Title

Report focus*

Report title*

Skip setup wizard?

[Cancel](#)

[Next](#)

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>

Behavioural Incidents	SEN
Behavioural Notes	SEN Events
Child Protection Notes	SEN Notes
Clubs	Safeguarding Notes
Course Enrolments	School
Course Leads	Staff
Courses/Classes	Staff Absence
Internal Exclusions	Staff Allowances
Learning Aim Enrolments	Staff Contract Post
Looked After (In Care) Notes	Staff Impairments
Medical Conditions	Staff Meal Records
Medical Events	Staff Observations
Parent Portal Meal Choices	Student Funding
Parents, Guardians and Contacts	Student Meal Records
Pastoral Notes	Students
Planned Absences	Students involved in Behavioural Incidents
Point Awards	Suspensions
Rooms	Trips

- 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)

[« Back](#)

Create a New Report: Set Effective Date (Step 2 out of 8)

Help

An effective date is the date upon which something is considered to take effect, which may be a past, present or future date. This may be different from the date upon which the event occurs or is recorded.

In the case of your custom report, this is the date for which you wish to report upon your chosen topic. For example, you may only be interested in reporting on students who were enrolled last spring, or staff members who were at your organisation last year.

You can set an absolute date, where you explicitly define a date, or a period of time between two set dates. For example on 08 Mar 2017, or between 25 May 2017 and 02 Jun 2017. Or, you can set a relative date range, such as "last week" or "last term" which will change as time goes on.

Top tips:

If you set your own absolute date range, the "Date Range" value will show as "Custom". This means it will report on the exact dates you set.

If you want to report on one day only, please make sure the "From" and "To" dates are the same date.

The "To" date must be later than, or the same as, the "From" date.

Date Range

Date Range Current academic year 1st Sep 2025 31st Aug 2026

Changing the date range will allow you to report on students enrolled over broader time period than the current academic year.

Next

- 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

Academic year
Current academic year
Next academic year
Previous academic year
Two academic years ago
Calendar week
Last week
This week
Custom
Custom
Day
Today
Yesterday
Term
Current term
Previous term

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

« Back ▲

Create a New Report: Select Columns (Step 3 of 8)

What happens on this step?

What columns would you like to see across the top of your report? Add columns to your report by searching for the columns you want from the left hand panel and then dragging them over to the right hand panel.

When you add a column type to the right hand panel, a slideover will appear where you can set some parameters for that column. For example, if you chose to include column "Demographics", you could then specify which demographics in particular you would like to see, for example, born in January, out of age group cohort.

You can then rearrange the order of the columns in the panel on the right. The top column will be the first column on the left of your report.

Select columns to add and drag each to the other side of the screen

Search for a column: Q

Student Name:

Name Legal Name Legal First Name Legal Middle Name(s)
 Legal Last Name First Name Last Name Former Name(s)

Profile Picture:

Profile Picture

Student Identifiers:

Arbor Student ID Globally Unique Student ID Student Number
 Legacy System ID UPN ULN NHS number
 Student ParentMail Identifier UCI

Doctoral:

Added Columns

Name in format Preferred name (E.g. Smith, Jonny) Edit Delete

[Skip setup wizard](#)
Bulk Add Assessment Columns ▾
[Preview columns and continue](#)

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

Select columns to add and drag each to the other side of the screen

Search for a column: Q

Current Enrolment: Year Group:

Year group(s) Head(s) of Year NC Year(s) Key Stage(s)
 NC Reception? NC Year 1? NC Year 2? NC Year 3? NC Year 4?
 NC Year 5? NC Year 6? NC Nursery second year (age 3-4)?

Enrolment History:

Year Group On Joining Year Group On Leaving NC Year Group on Leaving

- 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)

Added Columns	
Name in format Preferred name (E.g. Smith,Jonny)	 
Year group(s) today	 
Registration form(s) today	 
SEN at any time today? in format Yes/No	 
SEN status in format Name (e.g. "EHC Plan")	 
SEN need(s) in format Name (e.g. "Specific Learning Difficulty")	 

Edit Column

Report	SEN Student List
Field	Year group(s) today
Column label	<input type="text" value="Override default column label..."/>

Date range

Relative dates*	<input type="text" value="Today"/>
Custom start date*	<input type="text" value="20th Jan 2026"/>
Custom end date*	<input type="text" value="20th Jan 2026"/>

Other settings

Summary Row Formula	<input type="text"/>
Hide field	<input type="checkbox"/>

Conditional Formatting (applied in order shown)

None found

Cancel
Save and add formatting
Save

- 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)

« Back

Create a New Report: Reorder Columns (Step 4 of 8)

Skip setup wizard
Continue to column sorting

What happens on this step?

Take a look at the columns you've chosen and review any parameters you've set. This is a chance for you to make any changes you might need to make to the columns before moving on. To change the column order, drag and drop the columns into the desired order. The top value here will be the first column on the left of your report, and the bottom value will be the furthest right hand column.

If you need to change the parameters for a column, click "Change" to be taken back to the previous step.

Name in format Preferred name (E.g. Smith,Jonny)	 
Year group(s) today	 
Registration form(s) today	 
SEN at any time today? in format Yes/No	 
SEN status in format Name (e.g. "EHC Plan")	 
SEN need(s) in format Name (e.g. "Specific Learning Difficulty")	 

- 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)

[« Back](#) **Create a New Report: Sort Columns (Step 5 of 8)**

What happens on this step?

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.

Name	<input checked="" type="radio"/> A-Z	<input type="radio"/> Z-A	Delete
+ Add another			

[Skip setup wizard](#) **Save and continue**

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)

[« Back](#) **Create a New Report: Add Filters (Step 6 of 8)**

Help

A filter allows you to view specific rows in your report, while hiding other rows. You can add a filter to choose to see only data that meets a specific criteria that you set. A filter therefore reduces the total number of records you see to only those that match your criteria. In the illustration below, we've filtered for circles.



For example, if you chose to include column "First Name", you could then add a restriction so that only the first name "Anna" was shown. Or you could be interested only in students that are in year 6, or that have been late more than 5 times this year. To set a filter, type the name of the filter you would like to use in the "Select filter" box and click 'Set parameters'.

Filters

Select filter: [▼](#)

Set parameters

[Skip setup wizard](#) **Next**

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)

« Back ▲

Create a New Report: Add Groupings (Step 7 of 8)

Help

Groupings allow you to group all the individual results into categories or clusters. This means that you can choose how you see your rows (based on how you cluster the data). In the illustration below, on the left, we've grouped by colour, on the right we've grouped by size.

By default, the rows will be the individual students that you have selected with your filters. If you would like to view data about groups of students like registration forms, year groups or ASP groups; you can add these groups by searching the 'group by' box and clicking 'Add Grouping'.

Groupings

Group by: ▼

Add Grouping

[Skip setup wizard](#) **Next**

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)

« Back ▲

Create a New Report: Add Collations (Step 8 of 8)

Help

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'.

Collations

Collate by: ▼

Add Collation

[Skip setup wizard](#) **View Report**

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.

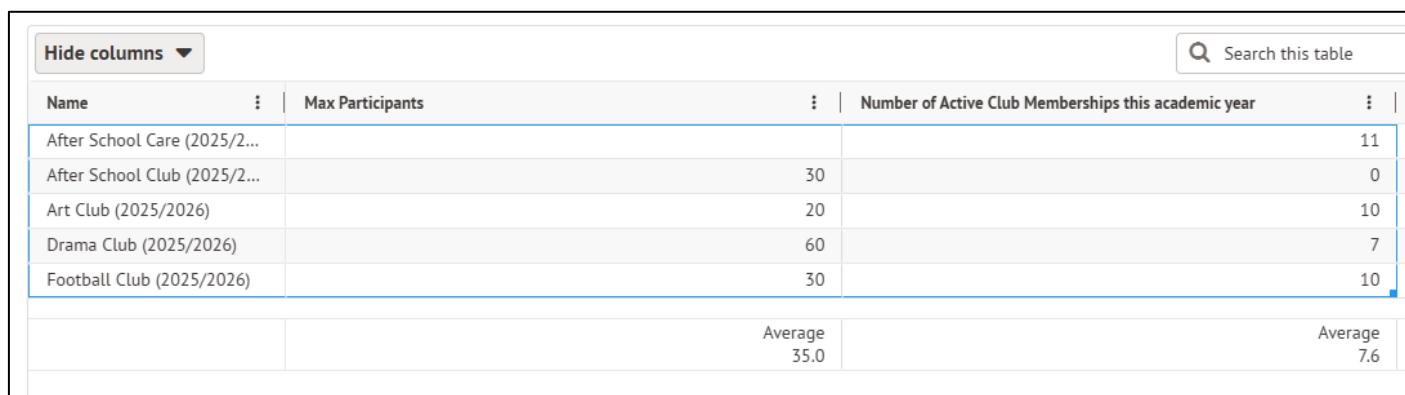
- **Click on the custom report** and it will run and display the results
- Click on the grey **Edit** button at the top of the screen
- **Make the changes** you require
- Click on the green **Save & View Report** button

Edit **Duplicate** **Delete**

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**.



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		Average
35.0		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

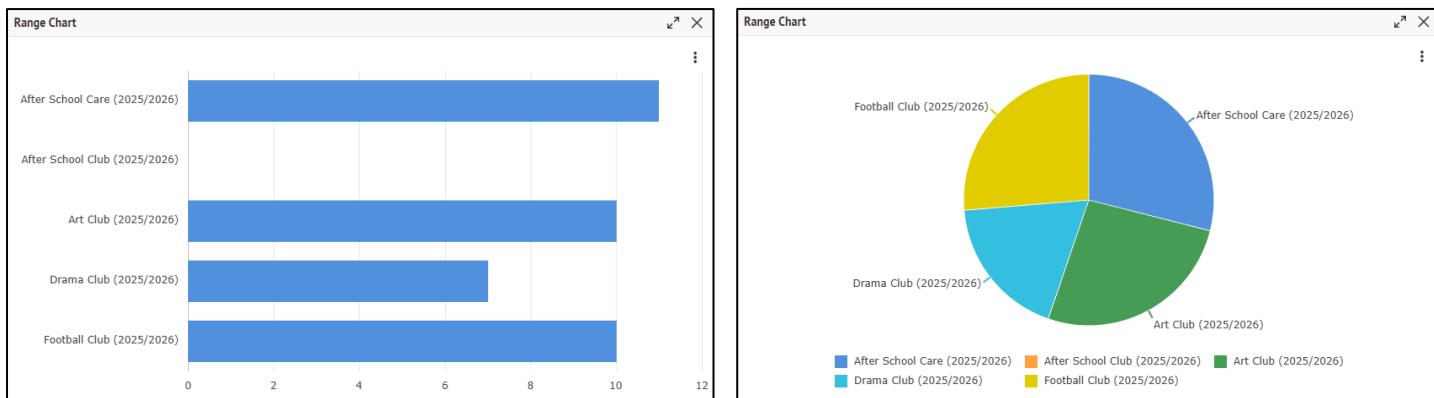
• Once you have selected your data, **right-click** and choose **Chart Range**. (If this option is greyed out, it means the selected data cannot be charted.)

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

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

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

- 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

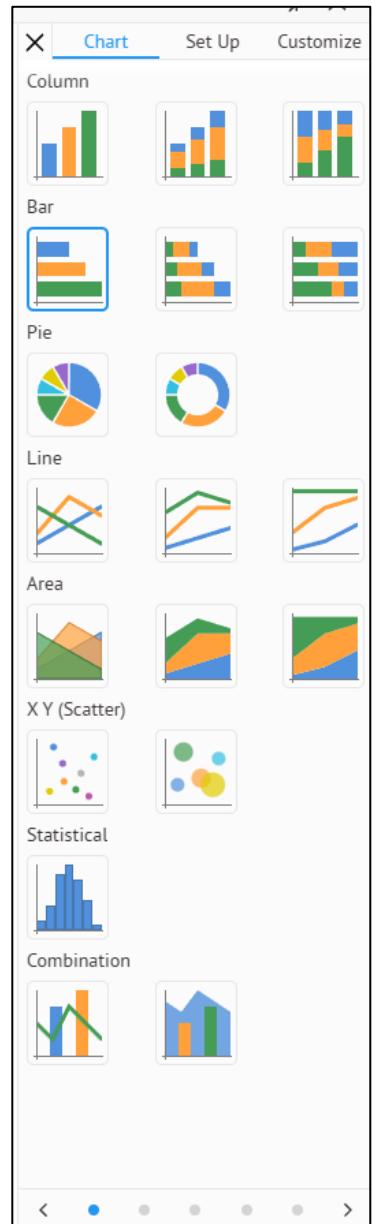
When the chart is full screen, there is a **menu icon** (3 dots) in the top right.



- Click on this **menu icon** and select **Edit Chart**
- You can now select a different chart if required
- The dots at the bottom 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

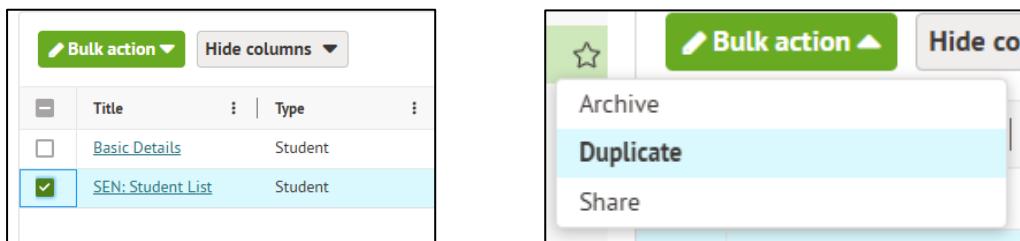
There are a couple of ways to duplicate a report. Duplicating a report saves time by eliminating the need to create the report from scratch and reapply all the formatting used in the original report.

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

Custom Report Writer - All Reports											Create New Report			
Showing all results											Change			
Active		Archived		Expired		Superuser: Active		Superuser: Archived		Superuser: Expired				
Download Schedule		Duplicate		Edit										
Bulk action ▾		Hide columns ▾		<input type="text"/> Search this table										
□	Title	⋮	Type	⋮	Context	⋮	Created By	⋮	Created Date	⋮	Modified Date	⋮	Accessed Date	⋮
<input type="checkbox"/>	Basic Details		Student		Students		Eva Louzao		10th Dec 2025		10th Dec 2025		10th Dec 2025	
<input type="checkbox"/>	SEN: Student List		Student		Students		Eva Louzao		21st Jan 2026		21st Jan 2026		21st Jan 2026	

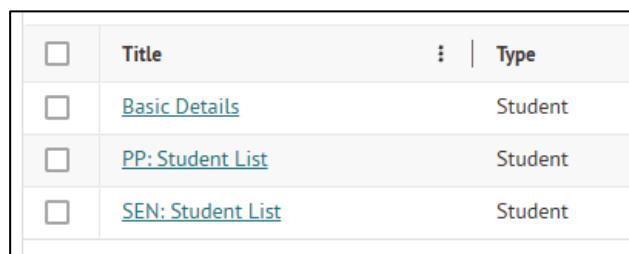
- Click on the **tick box to the left** of the report name
- Click on the green **Bulk Action** button and select the **Duplicate** option



The image shows a screenshot of the 'Custom Report Writer - All Reports' interface. In the top right corner, there is a green 'Bulk action' button with a white arrow pointing up. A dropdown menu has opened from this button, showing three options: 'Archive', 'Duplicate' (which is highlighted with a blue background), and 'Share'. The rest of the page shows a table of reports with two entries: 'Basic Details' and 'SEN: Student List'.

- 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

□	Title	⋮	Type
<input type="checkbox"/>	Basic Details		Student
<input type="checkbox"/>	SEN: Student List		Student
<input type="checkbox"/>	SEN: Student List (Duplicate)		Student



The image shows a screenshot of the 'Custom Report Writer - All Reports' interface. The table now includes a fourth row for the 'SEN: Student List' report, with the new entry being 'SEN: Student List (Duplicate)'.

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.

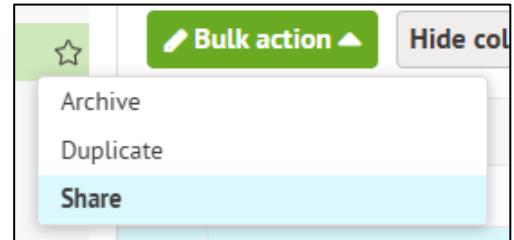
Please note that if the report contains sensitive information (for example, safeguarding or child protection data), the users you share it with must also have the appropriate permissions to view that data. Otherwise, they will not be able to run the report.

School > Custom Report Writer

Custom Report Writer - All Reports											Create New Report			
Showing all results											Change			
Active		Archived		Expired		Superuser: Active		Superuser: Archived		Superuser: Expired				
Download Schedule		Duplicate		Edit										
Bulk action Hide columns		Search this table		 		 		 		 				
<input type="checkbox"/>	Title	:	Type	:	Context	:	Created By	:	Created Date	:	Modified Date	:	Accessed Date	:
<input type="checkbox"/>	Basic Details		Student		Students		Eva Louzao		10th Dec 2025		10th Dec 2025		10th Dec 2025	
<input type="checkbox"/>	PP: Student List		Student		Students		Eva Louzao		21st Jan 2026		21st Jan 2026		21st Jan 2026	
<input type="checkbox"/>	SEN: Student List		Student		Students		Eva Louzao		21st Jan 2026		21st Jan 2026		21st Jan 2026	

Showing 3 results

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



[« Back](#) **Share Report**

Report Being Shared
PP: Student List

Share in Arbor
Sharing a report within Arbor means that another user can see the report in their list of custom reports.
The person you share this with can only see data they have sufficient permissions for.

Share report with

Access View Edit

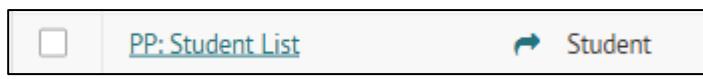
Share by Email
The email with the attached report will be shared from support@louzao.co.uk.
Please note: sharing a report via email will show the recipient the same data that you can see in the report.

Email Address

and also email to...

[Cancel](#) [Share Report](#)

- 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

View Report
Schedule Report
Share Report
Report History
Export

Shared				
Recipient		Access	Shared on	
<input type="checkbox"/>	Allen Chris	Administer	28th Jan 2026, 12:21	
Showing 1 result				

- **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**

<input type="checkbox"/>	Recipient	Access	
<input type="checkbox"/>	Allen Chris	<input type="text" value="Administer"/>	

[View](#)
[Administer](#)

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

Schedule "Attendance: Term on Term"

Help

You can schedule your report to run at a particular time on a regular basis. For example you may want to run a report every week on Monday, Wednesday and Friday; or perhaps only once a week on a particular day of the week. Once run, the report can be automatically shared with colleagues by email or in Arbor.

Run this report every*: starting on*: at*

When the results are ready:

Notify staff member:

Email the report to staff member: Email address:

[+ and also email to..](#)

Email subject line*: Scheduled Report from Arbor: Attendance: Term on Term

Email text*
Hi,
This is an automated message with the results of the Arbor scheduled report export.
Please find attached the Attendance: Term on Term report that Eva Louzao has created and scheduled to be sent to you.
All the best,
Team Arbor
[Click here to view this report in Arbor.](#)

Schedule

- 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

“Attendance: Term on Term” History

[Edit Schedule](#)

Help

On here you'll see the history of when this report was run, and who it has been shared with.

Attendance: Term on Term is scheduled to run every Friday at 14:00:00. Amy Mitchell, Eva Louzao gets notified in Arbor when the report is ready. vladimir.cvetic@arbor-education.com receives a copy by email when the report is ready. The report is about Students. The reports about the past months can be found in the table below.

Previous ‘Attendance: Term on Term’ reports

Report date range	⋮
Report date range	⋮

[Hide columns ▾](#)

[Search this table](#)

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 marksheets 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.

Date range

Relative dates* Today

Custom start date* 28th Jan 2026

Custom end date* 28th Jan 2026

Filter Condition

Is one of...

Year 1

Cancel Save

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.