

MIS Support Service



North
Tyneside
Council

NEWSLETTER – SUMMER 2025

Welcome to the Summer 2025 MIS Support Service Newsletter

We hope you all had a good Easter break.

We're ready to support you through all the processes you need to complete this term.

As part of our continuous service improvement, we're also offering more sessions, videos and guidance to help your school get the most from Arbor MIS and Finance.

MIS Support Webpage

Important updates and information will be published on our webpage, providing schools with up-to-date information at their fingertips.

The webpage can be accessed [here](#).

MIS Wiki

The MIS Wiki is located on the [Education Services Online](#) portal.

You can find all MIS Support guidance here under the **Resources** menu. This guidance is reviewed and updated regularly.

MIS Support Newsletter

Our newsletters will highlight important dates and tasks to be completed for the coming term, updates to MIS and Finance systems and relevant top tips.

As ever, we welcome your feedback and suggestions.



MIS Support Team Update

Last term we said goodbye to **Tommy Robson** and **Chris Spencer**, who moved on to exciting new challenges. They'll both be greatly missed, and we're sure you'll join us in wishing them well for their new ventures.

We were busy again last term making sure that we have the tools and knowledge to support you to get the most out of Arbor. Check out the webinars, workshops and training sessions on offer this term for more information.

We're also now an **Approved Arbor Training Provider!**



Accredited Partner

Summer Term Training and Workshops

This term we're offering a wide schedule of training courses and workshops to help you consolidate and further develop your knowledge and confidence in Arbor. Our aim is to help you get the most out of Arbor MIS and Finance.

Booking is now open, please visit: [Education Services Online](#)

April		
Tue 29	AM	Arbor Finance Essentials Workshop 1
May		
Thu 1	AM	Arbor Finance Essentials Workshop 2
Fri 2	AM	Managing Pupil Profiles Essentials
Tue 6	AM	Attendance for Admin Users Essentials
Wed 7	AM/PM	School Census Dry Run Workshop (Optional)
Fri 9	AM	Personnel Essentials Workshop
Tue 13	AM	Attendance Reporting and Analysis
Wed 14	AM/PM	Creating Academic Year 2025/26 and Pre-Admission Groups
Fri 16	AM	School Census Workshop
Mon 19	AM	
Tue 20	PM	
June		
Tue 3	AM/PM	Upload Census to Collect Workshop
Thu 5	AM	Custom Report Writer Workshop
Tue 10	AM/PM	Creating Academic Year 2025/26 and Pre-Admission Groups
Thu 12	AM	Housekeeping and Data Checking
Mon 16	PM	Attendance Reporting and Analysis
Thu 19	AM	Ask Arbor – Using Arbor's New AI Features
Tue 24	AM	End of Year Processes Session 1 (All schools)
	PM	End of Year Processes Session 2 (Schools with a Timetable only)
July		
Wed 2	AM/PM	End of Year Processes Session 1 (All schools)
Thu 3	AM	End of Year Processes Session 2 (Schools with a Timetable only)

Webinars

This term we're offering more FREE webinars to help you get the most from Arbor. The webinars will be delivered online via Teams, making it easy for you to attend. Recordings will also be made available on the MIS Wiki in the days after each live webinar.

Teams invites will be sent to all schools a few days before each webinar, please feel free to share these with any colleagues who may be interested in attending.

Keep an eye on our [webpage](#) and [Education Services Online](#) for further webinars.

As ever, we strive to adapt and develop our support around schools' needs. If you have any suggestions for future webinars, please email MIS.Support@northtyneside.gov.uk.

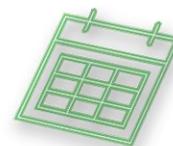
Webinar Subject	Date/Time
<p>Newly Released Features and AI in Arbor</p> <p><i>"Arbor are on a mission to transform the way schools work for the better"</i></p> <p>See the exciting, quick and easy to use new features available now, and some others that Arbor have in test, expected to be released soon.</p>	<p>Tuesday 6 May 2025</p> <p>14:00 – 14:30</p> <p>(via Teams Meeting)</p>
<p>Overview of the Arbor Parent Portal and Parent App</p> <p>Are you ready to consider upgrading your Arbor package to include parental communications? This session demonstrates Arbor's Parent Portal / Parent App where parents can monitor their child's attendance, update data, give consents, and much more.</p>	<p>Thursday 22 May 2025</p> <p>14:00 – 14:30</p> <p>(via Teams Meeting)</p>
<p>North Tyneside Tracker</p> <p>Have you considered bringing your Early Years, KS1 and KS2 attainment tracking into Arbor? If so, this session showcases the North Tyneside Tracker which is built in Arbor and maintained and supported by our team.</p>	<p>Friday 6 June 2025</p> <p>13:00 – 13:30</p> <p>(via Teams Meeting)</p>

DATES FOR YOUR DIARY

<p>School Census Day</p> <p>Thursday 15 May 2025</p>	<p>Online and classroom-based workshops are now available to book.</p>
<p>End of Key Stage</p> <p>KS2 tests: 12 – 15 May 2025</p> <p>External written moderation: 2 – 27 June 2025</p> <p>Phonics submission to the LA via S2S: 24 June 2025</p> <p>EYFS submission to the LA via S2S: 27 June 2025</p> <p>KS2 Teacher Assessment submission to PAG: 27 June 2025</p> <p>KS2 Test Results: 8 July 2025</p>	<p>Keep an eye on the MIS Wiki later in the term for guidance and videos on how to enter and submit your teacher assessments.</p>

SUMMER TERM PLANNER

To help you plan ahead and manage your time throughout this term, we've put together the planner below which highlights the key tasks that need to be completed during each month of the summer term.



SUMMER TERM		
APRIL	Attendance	Reporting for Spring Term
	Finance	Check monthly commitments Reconcile bank accounts Complete LBA Pro forma Close period 1 Import April Staffing Autorec file Prepare to complete CFR
MAY	Assessment	End of Key Stage Preparation
	Core Data	Create new academic year
	Pupil Data	Create intake groups and applicant records
	Statutory	Summer School Census Return
	Finance	Check monthly commitments Reconcile bank accounts Complete LBA Pro forma Close period 2 Import May Staffing Autorec file
JUNE	Assessment	End of Key Stage Processes
	Core Data	Record Leavers
	Pupil Data	Allocate applicants to Reg Groups for new year
	Statutory	Summer School Census Submission to COLLECT
	Year End	Start the required end of year processes
	Finance	Check monthly commitments Reconcile bank accounts Complete LBA Pro forma Close period 3 Import June Staffing Autorec file Complete
JULY	Assessment	NT Tracker Summer Data and Analysis NT Tracker Reporting
	Attendance	Attendance Certificates
	Year End	Complete the required end of year processes
	Pupil Data	CTF Import from Feeder Schools CTF Exports for leavers CML Files for leavers to LA Registration Group lists for new year
	Finance	Check monthly commitments Reconcile bank accounts Complete LBA Pro forma Close period 4 Import July Staffing Autorec file
	AUGUST	Assessment
Housekeeping		Housekeeping Routines
Personnel		Staff Records, Leavers
Finance		Check monthly commitments Reconcile bank accounts Complete LBA Pro forma Close period 5 Import August Staffing Autorec file

ARE YOU READY FOR SUMMER TERM 2025?

SCHOOL CENSUS - DRY RUN

The census dry run will be available in Arbor two weeks before census day, 15 May 2025. If you'd like to start your census return early with support, come along to one of the optional Census Dry Run workshops which are now available to book.



SCHOOL CENSUS

The school census 'on the day' fields will be available in Arbor from census day, 15 May 2025. If you'd like to complete your census return with support, come along to one of the School Census workshops which are now available to book.

Full census guidance will soon be available on the MIS Wiki on [Education Services Online](#).

END OF KEY STAGE

This year, there is a statutory requirement to submit **EYFS, Phonics** and **KS2** data. As with previous years, EYFS and Phonics data should be submitted by the school to the LA via the S2S website, with the KS2 return uploaded directly to the DfE Primary Assessment Gateway.

Guidance, checklists and links to Arbor resources will soon be available via the MIS Wiki on [Education Services Online](#).

PREPARING FOR THE NEW ACADEMIC YEAR 2025-2026

Guidance is now available on the MIS Wiki for processes below. If you prefer, you can come along to workshops later in the term to complete this setup with support – sessions are now available to book.

- **Creating Academic Year 2025–26**

Setting up your school's term dates and holidays for 2025/26.

- **Setting up Intake Groups and Creating Applicant Records**

Creating applicant records this term not only saves you time in September but also allows you to include these children in reports, timetables and communications for example.

Workshops are also available to guide you through all other required processes to prepare for 2025/26 in Arbor. Full End of Year guidance will be uploaded in early May, once Arbor activate access to the required areas needed to complete your setup.

NORTH TYNESIDE ASSESSMENT TRACKER

Join the North Tyneside Tracker webinar to see the benefits of using this assessment tracking system in Arbor, which has been developed by the MIS Support Team to meet the requirements of School Improvement.

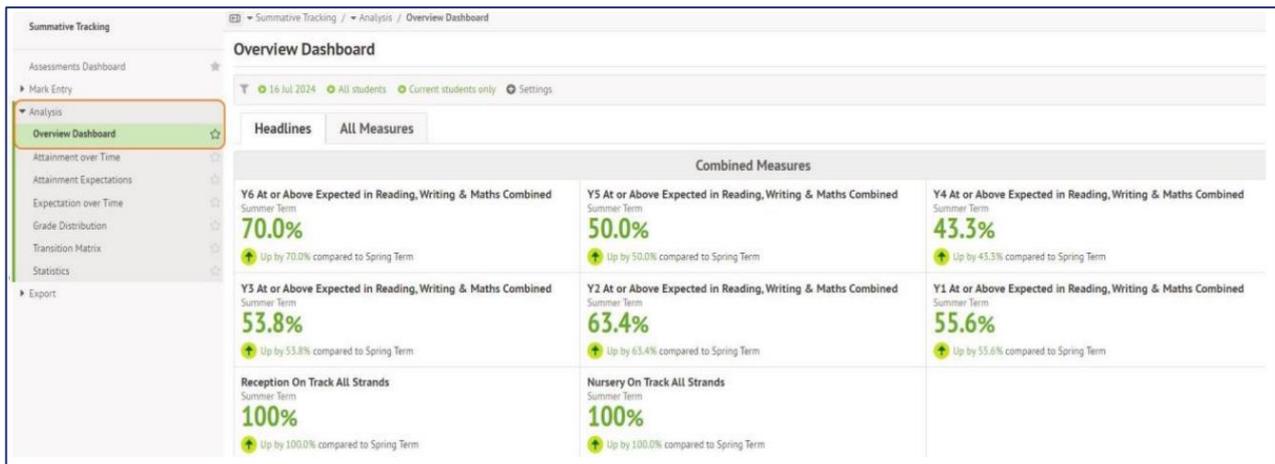


We expect that spring term teacher assessments will now have been entered by all NT Tracker schools.

If you'd like support to analyse your data in Arbor, please log a call in the usual way.

TRACKER PROGRESS DASHBOARDS

Make sure you've entered your baselines and targets to get the most out of Arbor's assessment analysis tools.



REPORT CARDS

Did you know that you can pull assessment data into a report card, which can be easily emailed to parents?

If this is of interest to you, please log a call for further information.

Assessment	Teacher	Teacher	Baseline	Year Target	Previous Mark	Current Mark	Comment
NT Maths	Mr T Robson	T R	55+	6M	6D	6D	Great work this term!
NT Reading	Mr T Robson	T R	5D	6M	6D	6D	Can do better!
NT Science	Mr T Robson	T R	5M	6M	5S	5S	Needs more effort
NT Writing	Ms L Armstrong	L A	55+	6M	6S	6S	



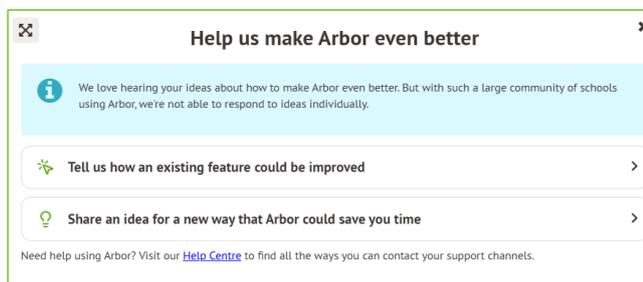
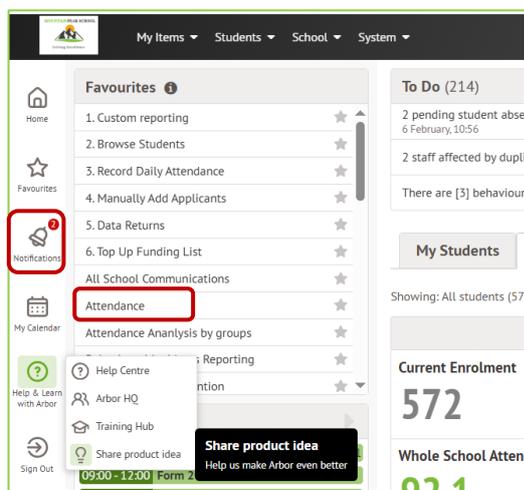
ARBOR UPDATES AND TOP TIPS



SUBMITTING SUGGESTIONS AND CHANGE REQUESTS TO ARBOR

If you're unsure if a process or function is currently available in Arbor, or already on their roadmap for future updates, please log a call with us to check. Where something you'd like isn't available, or already being developed, you can now easily share your product ideas/change requests with Arbor directly as below:

- Log into Arbor then click on **Help & Learn with Arbor**
- Select **Share Product Idea**.
- A pop-up will appear with two options:
 - **Improve an existing feature**
 - **Suggest a new feature**

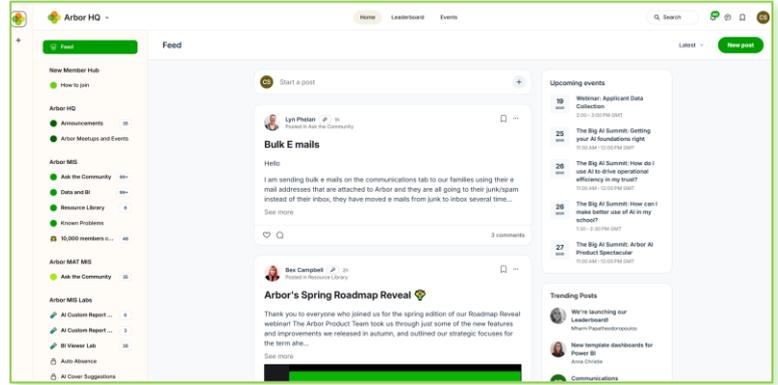


- Select the required option then complete the fields in the form that will open:
 - **Summary of your idea**
 - **Description**
 - **Your job title**
 - **Your email.**
 - **Include environmental data (optional)** – Check this box if you're happy for Arbor to automatically pull relevant details (for example what Arbor page you're on.)
- After submitting your idea, you'll see a confirmation message which will automatically close in 5 seconds.

NOTE: Arbor state that they review all submissions, and your feedback is invaluable in shaping the future of Arbor.

ARBOR HQ

This is a space where you can network with other Arbor users, share top tips, view Arbor’s webinar recordings, see what’s new each month, and much more. You can create your Arbor HQ account here <https://arbor-hq.circle.so/> using the same email address you sign into Arbor with.



NOTE: You can still log support calls for us whenever you need to, this is just an additional resource you can make use of if you choose to.

ARBOR SUPPORT PARTNER SATISFACTION SURVEY



Who or what is a Support Partner?

Arbor refers to teams like ours, that support schools in the use of Arbor as **Support Partners**. If you, or your colleagues receive emails from Arbor asking for your feedback, it’s just a short survey with 4 questions about how you find the support provided by your MIS Support Team. If you’re happy to do so, please complete this survey when you have a spare couple of minutes.

If you have any concerns, or would like to discuss the support you receive, please get in touch with us at mis.support@northtyneside.gov.uk

INTRODUCING ASK ARBOR - POWERED BY OPEN AI



Ask Arbor is built seamlessly into Arbor MIS, and is designed to turn your words into actions and answers wherever you see it pop up.

Want to know how attendance compares across year groups this term? Ask Arbor. Need to draft a difficult letter to parents and guardians this morning? Ask Arbor. Looking for a quick way to create a student report? You can Ask Arbor that too.

Ask Arbor is designed to make it simpler to get the data you need, and your bring ideas to life. The goal is to give you back time for more strategic work, more time spent making use of your data, and more time with students and staff.

Come along to the **Newly Released Features and AI in Arbor** webinar to see Ask Arbor in action.

CUSTOM REPORT WRITER UPDATE

Arbor have made some improvements to the Custom Report Writer following feedback from schools. Creating new reports is now quicker and easier, and you can also see which reports are being used so you can safely archive or delete ones you no longer use or need.



What's changed?

- There's now a consolidated **Create New Report** button, with easy-to-follow options.
- You can easily skip the setup wizard – perfect when you need to create a report quickly.
- Three new columns have been added to the **All Reports** table – **Created Date**, **Modified Date**, and **Accessed Date** – so you can see exactly which reports are being used.
- A new **Archive** tab has been added to help you audit and tidy up your reports without the risk of permanently deleting anything.

Why not join the **Custom Report Writer** workshop this term to learn how to get the most out of this powerful reporting tool.

Arbor Finance



Remember to stay in **Period 12** and do **NOT** record any further transactions until your Finance officer notifies you to run Year End.

FINANCIAL YEAR 2025 - 2026

BUDGET ALLOCATIONS

When year-end is complete, and the new financial year has been opened, you can post budget allocations against individual accounts.

CORRECTING ALLOCATIONS

It's not possible to remove an allocation once it's been posted, instead a further allocation should be posted of the opposite type:

Original Allocation type		Action required		New Allocation type
Expenditure	⇒	Remove / reduce	⇒	Income
Income	⇒	Remove / reduce	⇒	Expenditure

WARNING: BUDGET THRESHOLD

You may need to adjust the threshold on each budget to prevent the following message from appearing



Changing the budget threshold to 100% will help you manage and keep track of your budget spending.



Staffing Autorec file

After importing the staffing autorec, remember to post both the **INCOME** and the **EXPENDITURE** transaction from the file:

- **Transactions > View / Post batches,**
- select the **Income** tab, **select** all and **Post,**
- select the **Expenditure & Credit notes** tab, **select** all and **Post.**



Central payments

When recording monthly central payments, make sure you change the Bank account to **01 School Budget Share.**

Click [here - Arbor Finance Guidance](#) for further information.

CREDIT CARD TRANSACTIONS

Schools Finance recommend that all NatWest credit card transactions are recorded against a NatWest bank account. This makes it easier to reconcile the transactions and claim any VAT associated with them.



Transactions Expenditure Warning: this transaction will make the Nat West - Credit Card account overdrawn by -£250.00

Expenditure New order Search / Process Credit notes Re-imburse staff Express order

Expenditure header

Supplier * 653 Clavering Stationers Alternative payee

Gross total * 250.00 Date * 31 JAN 2024 Period 9

Reference * Credit Card Purchase None

Bank account * Nat West - Credit Card £0.00

Arbor Finance – Credit Card

Payments shows you how to **set up the bank account, record CC transactions and process the NatWest direct debit payment.**



Check List

BANK RECONCILIATION

Reconciliation discrepancies are very common at month end, but there are certain things you can check to help resolve the variances.



Why not book on the Arbor Finance Essentials Session 2 workshop this term to learn how to fix mistakes, identify and resolve reconciliation discrepancies, complete the LBA Proforma and much more!

Have you completed and checked the following:

Y/N

1. The **closing balance** of the bank statement matches the **reconciled total**?
2. Has **everything** on the bank statement been **reconciled correctly**, for example, correct value and not duplicated?
3. Have all **bank transfers** for **Bank Allocations, Petty Cash and NatWest** been completed correctly and to the **right bank account**?
4. Have all **transactions** on the bank statement have been entered into the **correct period**?
5. Do all the transactions show on the reconciled transactions report when ran for the current month/period?

*NOTE: as stated above, when reconciling transactions keep the **reconciliation reference** consistent for each month, for example, APR 25, MAY 25, JUN 25, as this will help you identify transactions.*

6. If there are transactions missing from the current month's reconciliation report, run the previous month's report. Enter any transactions relating to the current month in the **Adjustment** section of the pro forma, stating which period they were entered.
7. Have any **NatWest and/or Petty Cash** transactions been entered as an **adjustment**?
8. Have any **Journals in/out** on the **Cash Movement** report been entered as an adjustment?
9. Have any **Cheques** been entered as an adjustment?