Introduction

This mini-guide provides an overview of the **Arbor** import functionality.
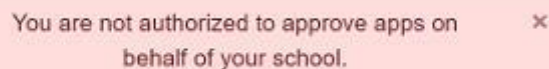
This mini-guide assumes the reader is familiar with the 4Matrix import wizard and focusses only on setting up and using the 4Matrix Arbor extract tool. Full instructions on working through the 4Matrix import wizard can be found in the full guides, accessible in the 4Matrix Help tab, or via our website at www.4matrix.com/documentation.

The Arbor extract tool can be used to import end-of-year examination results. It can also be used to create a new series, import early entries and pupil contextual details for any year group, such as teaching group information and photos. **It will save several hours' work when compared with setting up and importing spreadsheets containing similar information.**
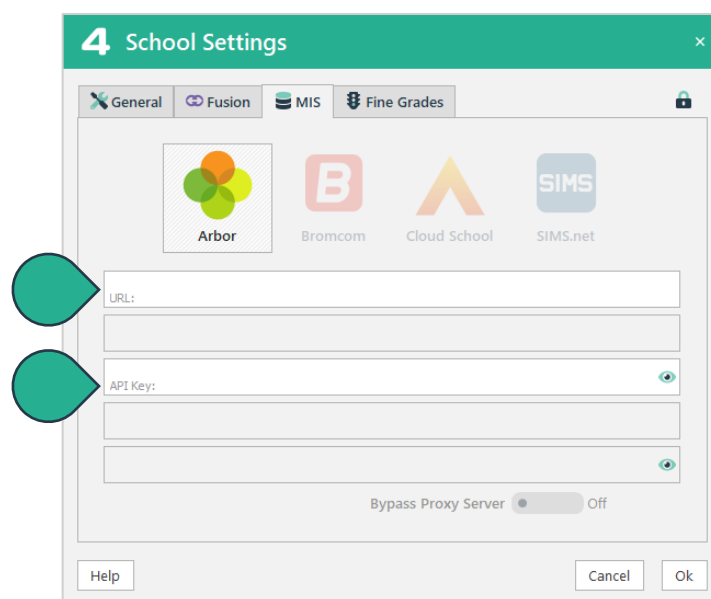
Initial Setup

1. Visit https://www.4matrix.com/arborsetup and login using your Arbor credentials.

2. Press 'Approve' to grant the connection between 4Matrix and Arbor.

   If an error message is displayed, as shown below, it is because only members of SLT or the school admin team can approve the connection:

3. Go to https://help.4matrix.com and log a ticket to notify 4Matrix that you are ready for the final part of the setup and include your name, email address and phone number.

4. 4Matrix will aim to contact you within 2 hours to assist with completing the details in the *4Matrix > Admin > School Settings* tool, adding the school's Arbor URL and unique API key:
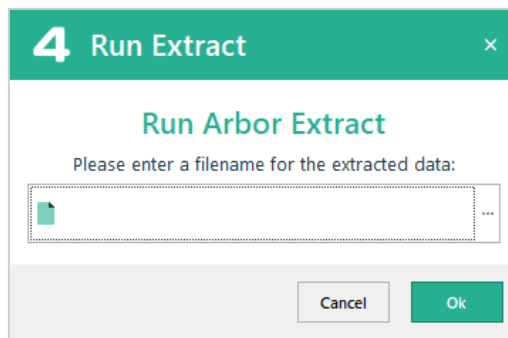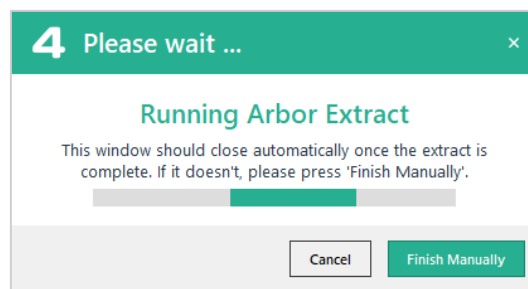
Launching the Arbor Extract Tool

1. Begin the import process by going to **Admin > MIS > Arbor**.

2. In the first step of the import, set your series details.

3. The Arbor extract can be initiated in the second step of the import, 'Step 2: Select Data'.

4. Click Run to start a new extract:
   The 'Load a saved extract XML' option can be used to open a previously saved copy of an extract for the selected pupils, if required.
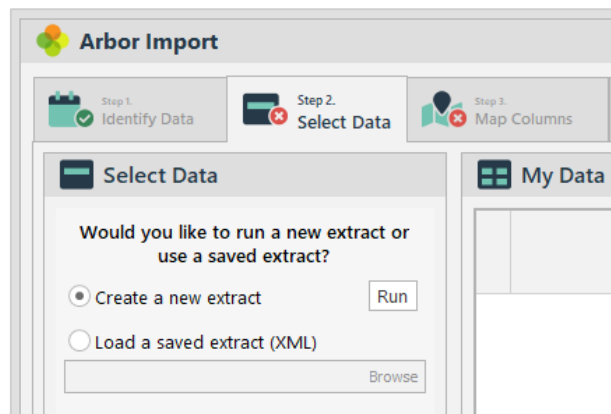
5. Choose a location to save a copy of the extract to on your PC. Click the ellipses (three dots) to open the file explorer window and type a name for file:
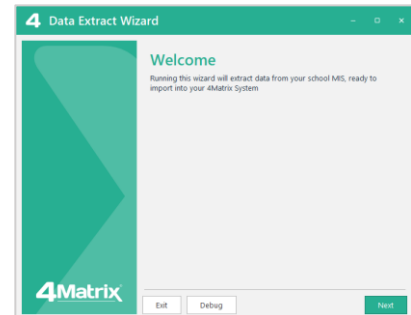

6. Click OK to launch the extract tool - a loading prompt will appear for a few seconds:
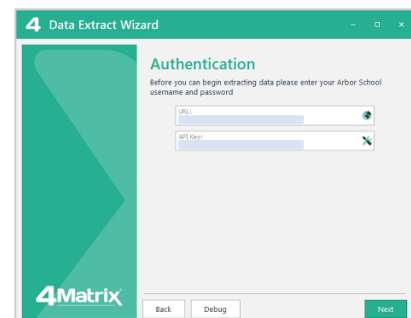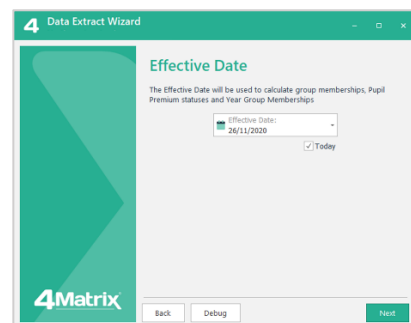
Using the Arbor Extract Tool

1. When the Arbor extract tool opens, click Next.

2. The **Authentication** step should show the URL the school uses to access Arbor, along with an encrypted version of the API key. Click Next.

3. The **Effective Date** will default to today's date. When importing exam results in August, this should be set to the date of the January Census.

4. In the **Year Groups** panel, confirm the Year group you wish to extract data for.
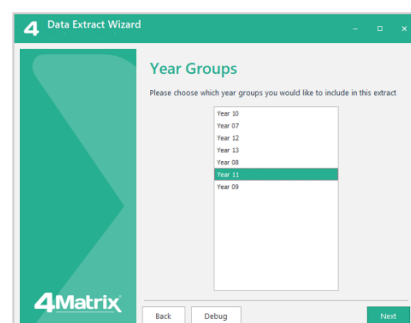
5. In the **Data to Include** step, use the tick boxes to confirm which data types to include with the extract. When importing exam results, ensure that the Exam Results box is ticked.
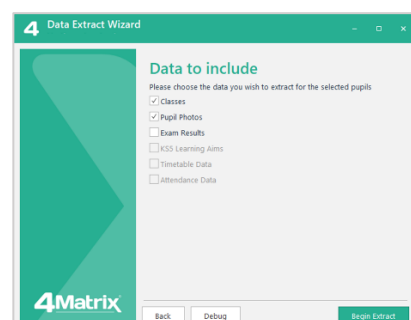
Using the Arbor Extract Tool Cont./

6. The **Extracting Data** prompt is shown while the data is collected. Depending on the number of pupils and results, this might take several minutes to complete.
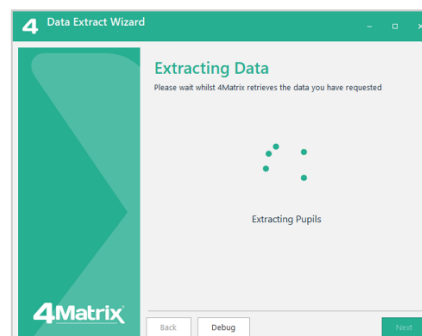
7. The final part of the extract tool includes a preview of the data. This is more easily accessible after clicking **Finish**, which takes the user back into the 4Matrix import wizard to complete the mapping and data validation steps.
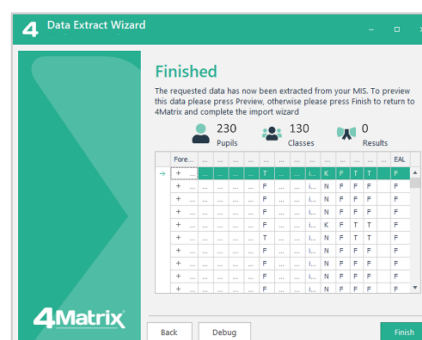
8. Once back in 4Matrix, work through steps 3, 4 and 5 to finish importing the extracted data into the 4Matrix database.
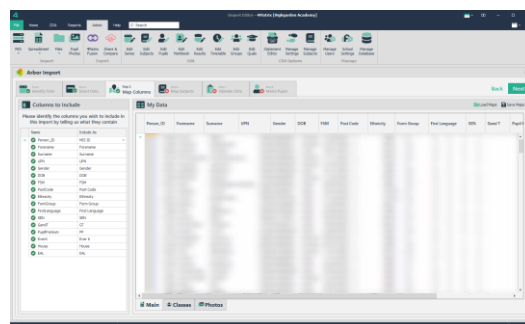
Further Reading and Getting Help

The Help tab in 4Matrix contains links to the full application guides, our support portal and News feed.

4Matrix website: https://www.4matrix.com

4Matrix Support Portal: https://help.4matrix.com

https://www.facebook.com/groups/4matrixdata/

Join our Facebook group - It is a great place for school leaders and Data Managers to discuss secondary performance data, with **over 800 members** to date. We also talk about the latest 4Matrix developments, news, and share useful documents and resources.