

Import Y4 transfer files (new Year 5) into Integris

Import Assessment transfer data for new Year 5 pupils

A **NEW Y5 IMPORT 2019** markbook is available in your Integris Assessment to use for importing Y4 transfer data received from feeder lower schools.

To be undertaken by the Integris Administrator

These instructions cover the following:

Step 1: check/assign the appropriate KS1 year for your new Y5 pupils for Sept 2019

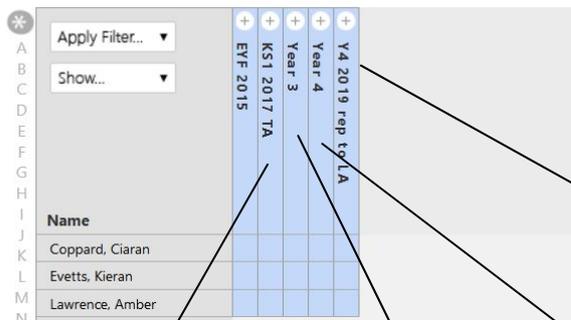
Step 2: prepare the **New Y5 Import 2019** markbook

Step 3: import the data from the Y4 transfer files received from feeder schools

IMPORTANT!

Before you proceed with the steps, take a moment to see the contents of the **New Y5 Import 2019** markbook and how the columns will be populated:

Markbook - New Y5 Import 2019 - Class 2A (2018/2019)



	EYF 2015	KS1 2017 TA	Year 3	Year 4	Y4 2019 rep to LA
Name					
Coppard, Ciaran					
Evetts, Kieran					
Lawrence, Amber					

KS1 2017 TA

This data - IF included in the **CTF** from the previous school - will appear.

See Stage 2 step 2.4 to pull KS1 data through into this markbook and further details

Year 3

This TA data will appear if the feeder school was recording Year 3 TA data using the Integris Objectives Termly markbooks – otherwise will remain blank

Y4 TA

This TA data will appear if the feeder school was recording Year 3 TA data using the Integris Objectives Termly markbooks – otherwise will remain blank

Year 4 2019 rep to LA

This TA data will import if the feeder schools has recorded Y4 TA data for a CBC return .

See Annex 1 for list of data columns in each unit

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Step 1: check/assign KS1 year to new Year 5 pupils

- 1.1 You must ensure that you have imported either ATFs (and/or CTFs) files containing the pupils' UPNs and other information into your **Integris Admissions Roll** (as per the early stages of the Year End procedures)
- 1.2 Using **Speed Edit** > select **KS1 Year** under **Area** > click Find and select all your new Year 5s **in the Admission Roll** > click select and click Yes to the prompt to select all > ensure that all these pupils have **2017** assigned – if not, select **2017** in the new value list > Assign > Save.
- 1.3 Staying in Speed Edit, check '**KS1 End of statutory assessments**' under Area > ensure the value is **Yes**

Step 2: Prepare **New Y5 Import 2019** markbook

- 2.1 Go to **Assessment > Assessment Planning > Templates > LA Templates > Year 5 Imports** folder
> click on **New Y5 Import 2019** markbook
> click **Deploy**
> click No to the next prompt.

You should now see the **New Y5 Import 2019** markbook appear **in bold** within a new '**Year 5 Imports**' folder under your **My Assessment Plans** folder.

- 2.2 With the '**New Y5 Import 2019**' markbook highlighted, click **Edit** > click **Enrolled Groups** tab > click **Add Enrolled Group** icon

> in the next window, change the Classes drop down to **Ad-Hoc Group**
> in the name box, type in '**New Y5 Sep 2019**'
> click **Add Student List** button
> in the search screen, select **Admissions** as the **Roll Status** and click Find > if all (or majority) of your pupils listed are those due to start in September, click Select and click Yes to the prompt to select them all so that they are listed in the **Enrol Groups** window - *you can at this point select any individual pupil and click on the Bin icon to remove them from the list if you wish, but this isn't important.*
> **click Add**
> then **close** this pop up window.
> select the **Ad-Hoc New Y5 Sep 2019** entry from the **Enrolled Groups** list
> click on **Add Markbook users** icon
> from the list, **select your user ID** so that only you can see the data (*at this stage, it should only really be the data administrator*)
> click **Ok**
> click **Save**.
- 2.3 **Now check that the markbook appears as expected:**
> go to **Assessment > Markbook** > select the **New Y5 Import 2019** markbook for the **Ad-Hoc new Y5 Sep 2019** pupils and click **Open**

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Markbook - New Y5 Import 2019 - Class 2A (2018/2019)

Apply Filter...			+	+	+	+	+
Show...		Previous School	EVF 2015	KS1 2017 TA	Year 3	Year 4	Y4 2019 rep to LA
Name							
Coppard, Ciaran		n/s					
Evetts, Kieran		n/s					
Lawrence, Amber		n/s					

> you should see the **Previous school** column appear which should display the **DfE number** (by hovering over the number, you will see the school name) – *this is only if you have imported the pupil's ATF or CTF files into the Admissions roll for these pupils previously.*
Note: the Previous feeder school will enable you to ascertain whether the school is using Integris or Sims and therefore you can be prepared as to what type of file you should be expecting to receive from the school!!!!

> check that all the pupil names appear as expected

2.4 **KS1 2017 Unit** (this can be worked on ahead of importing any Y4 transfer files from feeder schools):

Open this unit and check whether any KS1 data appear in the columns.

If your school has imported CTF files sent from feeder schools, then it is likely that most, if not all the pupils for each feeder school will have some KS1 data present. In this case, if KS1 data is present, you will see it in this unit.

If KS1 data does not appear for any of the pupils, then it is possible that the KS1 data has imported via CTF but has not pulled through into this markbook: to check this, click Back to exit the markbook.

Go to **Administration > Utilities > Update Year Independent Key Stage Markbooks ... >** select **KS1** from drop-down menu > select **Student Find** in the **Select Students by** drop – down menu

Update Year-Independent Key Stage Markbooks

Select Students by: Select Key Stage:

Ref No.	Surname	Known Name	Year	Class
+ - 🔍				

> click **Add Student to the list**  icon

> change the **Roll Status** to **Admissions** > click Find and select the new Year 5 pupils currently in your Admissions roll so that they are listed in the Update screen

> then click on **Update**.

> When the progress window completes, click **OK**.

> Go back to **Assessment > Markbook** > select the **New Y5 Import 2019** markbook for the **Ad-Hoc new Y5 Sep 2019** pupils and click **Open**. Open the **KS1 2017** unit and check to see if any KS1 data has appeared.

2.5 If some data has appeared for some pupils, and still missing for other pupils, then you will need to find the missing KS1 data from the K2S (Key to Success) website. See separate

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Import KS1 data instructions on how to do this.

You are now ready to import the data from feeder lower schools' Y4 Transfer files.

Step 3: Import data from Y4 Transfer files

Please note the following:

- **Transfer files that have been created from Integris** will automatically import into your Integris as the data column headers should match – see Appendix A for list of the column headers. (Follow steps 3.2 – 3.7 below).
- Transfer files created from Sims or any other spreadsheet will need your manual intervention when importing (steps 3.8 – 3.13. below). The spreadsheet files received must be saved as a csv file.
- Transfer files sent to you as Word documents cannot be imported into Integris – the information has to be recorded on a spreadsheet which must include a column for UPNs and saved as a csv file.

3.1 PLEASE CHECK THE NAME and the CONTENT OF EACH Y4 TRANSFER FILE first. The file will have been created in Integris if the file is called <feeder lower name> Y4 Transfer 2019 <yourschoolname> (this is usually a csv file indicated by ) AND when you open the file it looks like this:

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	
Surname	Known Na	Student Uf	Destinletor	Gender	Date of Bir	SEN Stage	Entitled to	Ever FSM	Pupil Pren	Ethnicity	Language	English as	Gifted And	Traveller	Previous S	Listening	Understan	Speaking	Moving	Health	Se
Coppard	Ciaran	K8232117	4567	M	#####	A	N	N	N	WSCO	ENG	N	N	N	n/s	2	1	2	1	2	
Evelts	Kieran	H8232117	2310	M	20-Oct-04	P	N	N	N	WTUK	ENG	N	N	N	n/s	3	3	3	2	3	
Lawrence	Amber	V8232117	n/s	F	#####	P	N	N	N	WBRI	ENG	N	N	N	n/s	1	1	1	1	1	

A list of the column headers expected in a Y4 Transfer file created through Integris can be found in Annex 1.

If this is the case, proceed to step 3.2.

If the file is as above but is saved as an xls file , then convert it to a csv by going to **File > Save As > change file type to Comma delimited (csv)**

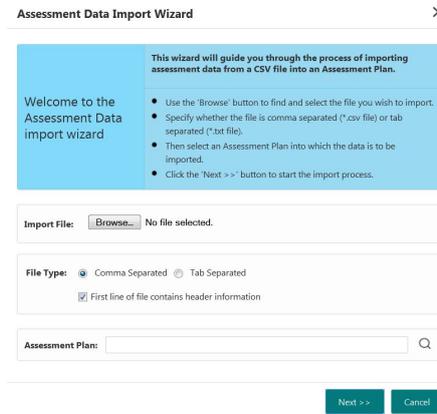
If the file is called anything different to the above and when opened, does not have the same column headings as the above diagram, then you will need to work out what each of the columns contain and which columns they need to be matched against in your Y5 Import markbook. When you have done this, please proceed direct to step 3.8.

If the file sent to you is a Word document with a table of pupil details and their results, this needs to be transferred onto an Excel spreadsheet (by copying the table and pasting onto a spreadsheet) and saved as a csv file (File > Save As > change file type to Comma delimited (csv)). As per above, you need to work out what each of the columns contain and which columns they need to be matched against in your Y5 Import markbook. When you have done this, please proceed direct to step 3.8.

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To import an Integris Transfer file

3.2 Go to **Assessment > Utilities > Assessment Import**



Assessment Data Import Wizard

Welcome to the Assessment Data import wizard

- Use the 'Browse' button to find and select the file you wish to import.
- Specify whether the file is comma separated (*.csv file) or tab separated (*.txt file).
- Then select an Assessment Plan into which the data is to be imported.
- Click the 'Next >>' button to start the import process.

Import File: No file selected.

File Type: Comma Separated Tab Separated

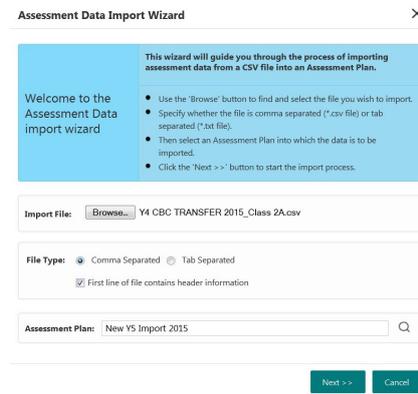
First line of file contains header information

Assessment Plan:

3.3 Click on **Browse** and locate your **Y4 Transfer** csv file (created in Integris) you wish to import and click **Open**

3.4 Click on mag glass icon > click on + next to **My Assessment Plans** > scroll down list until you find the **Year 5 Import** folder and click + next to it > click on **New Y5 Import 2019** markbook and click **OK**

similar to the example below:



Assessment Data Import Wizard

Welcome to the Assessment Data import wizard

- Use the 'Browse' button to find and select the file you wish to import.
- Specify whether the file is comma separated (*.csv file) or tab separated (*.txt file).
- Then select an Assessment Plan into which the data is to be imported.
- Click the 'Next >>' button to start the import process.

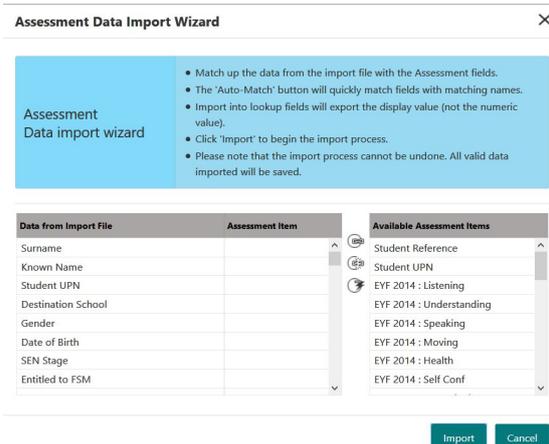
Import File: Y4 CBC TRANSFER 2015_Class 2A.csv

File Type: Comma Separated Tab Separated

First line of file contains header information

Assessment Plan:

> click **Next**



Assessment Data Import Wizard

Assessment Data import wizard

- Match up the data from the import file with the Assessment fields.
- The 'Auto-Match' button will quickly match fields with matching names.
- Import into lookup fields will export the display value (not the numeric value).
- Click 'Import' to begin the import process.
- Please note that the import process cannot be undone. All valid data imported will be saved.

Data from Import File	Assessment Item	Available Assessment Items
Surname		<input type="radio"/> Student Reference
Known Name		<input type="radio"/> Student UPN
Student UPN		<input checked="" type="radio"/> EYF 2014 : Listening
Destination School		EYF 2014 : Understanding
Gender		EYF 2014 : Speaking
Date of Birth		EYF 2014 : Moving
SEN Stage		EYF 2014 : Health
Entitled to FSM		EYF 2014 : Self Conf

***To confirm that the transfer file you have selected has been created in Integris, you should see the same column headings **for data** in both panes!
As you scroll down the items in the left pane, you will notice that the data headings are the same as those listed in the right pane.

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- 3.5 Click on the **Automatch**  button and you will see the items in the right pane move across to the left automatically where there is a match > then click on **Import**.
- 3.6 When the import process is finished, you will be prompted with either a '**Import of Assessment data has completed successfully**'
OR
you will be prompted to **Generate a Report**. In all cases where you are prompted to generate the report, click on this button to check for any discrepancies – it will point out where a pupil in your transfer file may not exist in your markbook or you may have missing data for some of the columns. *This is perfectly acceptable as the sending school may not have data for all the columns.*
- 3.7 **To check what has been imported:**
>go to **Assessment > Markbook** > select the **New Y5 Import 2019** markbook > click Open

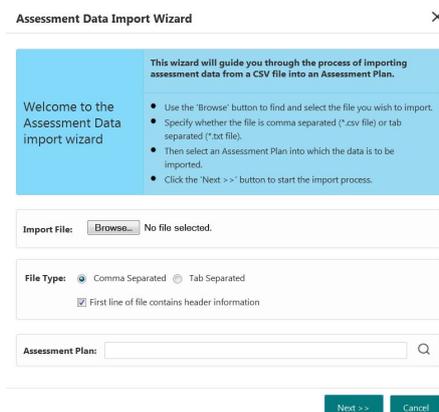
You should be able to see what data has been imported.

Repeat steps 3.1 – 3.7 for each Integris Y4 Transfer file received if created by an Integris feeder lower school.

To import a Y4 Transfer file created in SIMS or any other spreadsheet:

Important!! At this point you have saved the Y4 Transfer file as a csv file and have identified which columns in the Y5 Import markbook the data needs to be matched to:

- 3.8 Go to **Assessment > Utilities > Assessment Import**



Assessment Data Import Wizard

Welcome to the Assessment Data import wizard

This wizard will guide you through the process of importing assessment data from a CSV file into an Assessment Plan.

- Use the 'Browse' button to find and select the file you wish to import.
- Specify whether the file is comma separated (*.csv file) or tab separated (*.txt file).
- Then select an Assessment Plan into which the data is to be imported.
- Click the 'Next >>' button to start the import process.

Import File: No file selected.

File Type: Comma Separated Tab Separated

First line of file contains header information

Assessment Plan:

- 3.9 Click on **Browse** and locate your **Y4 Transfer** csv file you wish to import and click **Open**
- 3.10 Click on magnifying glass icon > click on + next to **My Assessment Plans** > scroll down list to find the **Year 5 Import** folder and click + next to it
> click on **New Y5 Import 2019** markbook and click **OK**
> click **Next**

You should see that the column headings in the left and right hand pane differ and these will need to be matched by yourself **with caution**. *The headings on the left are those from the Y4 Transfer file.*
If the headings in the left pane are difficult to distinguish, cancel out at this point and open the

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transfer file separately to take a closer look – you need to work out what each column in the transfer contains so that you can match them against the correct column in your Import markbook.

3.11 To match the columns manually:

>Click the column heading in the left pane
> then click the column heading in the right pane

> then click on  **Link Assessment Item** icon which will move the column heading from the right pane next to the column heading selected in the left pane.

Continue in the same way to match the remaining items. Ensure that you have matched the columns correctly!!!!

3.12 When you are sure you have matched all the columns you need to import accurately, click **Import** to import the data.

3.13 When the import process is finished, you will be prompted with either a '**Import of Assessment data has completed successfully**'

OR

you will be prompted to **Generate a Report**. In all cases where you are prompted to generate the report, click on this button to check for any discrepancies – it will point out where a pupil in your transfer file may not exist in your markbook or you may have missing data for some of the columns. *This is perfectly acceptable as the sending school may not have data for all the columns.*

3.14 **To check what has been imported:**

>go to **Assessment > Markbook** > select the **New Y5 Import 2019** markbook > you should be able to see what data has been imported.

Repeat steps 3.8 – 3.14 for each Y4 Transfer file that has not been created as an Integris exported csv file.

All of the data you have imported will automatically transfer into the markbooks for 2019/2020 after the Year End process has been completed at the start of the new academic year in September.

Well done – you have completed the new Y5 import procedure.

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Annex 1 - List of data columns in a Y4 Transfer 2019 file created in Integris

Pupil contextual details	Surname
	Known Name
	Previous School
EYF 2015 unit	All 17 ELG outcomes
KS1 2017 TA unit	KS1 En Rea
	KS1 En Wri
	KS1 MA TA
	KS1 Sc TA
Year 3 unit	EoY3 Read Av Pts
	EoY3 Read Av Cat
This data will only be imported if you are using the Integris Y3 Objectives Termly markbooks	EoY3 Read TA Pts
	EoY3 Read TA Cat
	EoY3 Writ Av Pts
	EoY3 Writ Av Cat
	EoY3 Writ TA Pts
	EoY3 Writ TA Cat
	EoY3 Maths Av Pts
	EoY3 Maths Av Cat
	EoY3 Maths TA Pts
	EoY3 Maths TA Cat
Year 4 unit	EoY4 Read Av Pts
	EoY4 Read Av Cat
This data will only be imported if you are using the Integris Y4 Objectives Termly markbooks	EoY4 Read TA Pts
	EoY4 Read TA Cat
	EoY4 Writ Av Pts
	EoY4 Writ Av Cat
	EoY4 Writ TA Pts
	EoY4 Writ TA Cat
	EoY4 Maths Av Pts
	EoY4 Maths Av Cat
	EoY4 Maths TA Pts
	EoY4 Maths TA Cat
Y4 2019 rep to LA unit (Age Related Expectations)	Y4 Read TA
1= Below ARE; 2=At ARE; 3=Above ARE; A=unable to assess	Y4 Writ TA
	Y4 Maths TA