

Transferring Y4 data from Integris Assessment

Stage 2: Create Y4 Transfer Files

To be undertaken by the Integris Administrator

Stage 2 contains the following **two** main steps:

1. Check status of markbook and note the destination middle schools
2. Create the transfer files

1. Check the status of the markbook:

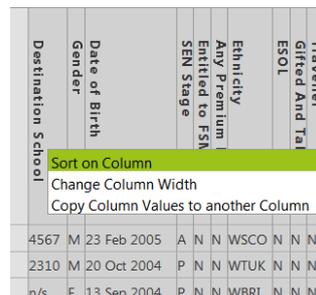
- 1.1 Go to **Assessment > Markbooks** > select the **Y4 TRANSFER 2019** markbook assigned to your **Year 4** pupils to highlight it in bold.

- 1.2 Click the **Open Markbook**  icon

At this stage, the **Y4 TRANSFER 2019** markbook has been checked for the required data present and is now ready for use to create transfer files to destination schools.

2. Check and note the destination middle/primary schools

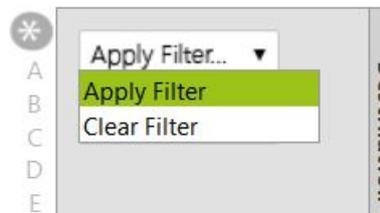
- 2.1 Sort the Destinations schools column to group the different destination schools together by **left clicking the column heading** for destination school and click on **Sort on Column**.
This action will group together all the destination schools in ascending order. Repeat it to sort the schools in descending order.



Destination School	Gender	Date of Birth	SEN Stage	Any Premium Entitled to FSN	Ethnicity	ESOL	Traveller Gifted And Tal
4567	M	23 Feb 2005	A	N	N	WSCO	N N N
2310	M	20 Oct 2004	P	N	N	WTUK	N N N
n/s	F	13 Sep 2004	P	N	N	WBRI	N N N

- 2.2 Hover over each of the different DfE numbers **and note down the different destination school names and their DfE numbers, also making a note of the number of pupils that have the same destination school**. [Note: the number of different DfE numbers you list represents the number of transfer files you need to create in step 3 below].

- 2.3 Click **Apply Filter > Apply Filter** (at top left of markbook)



You will be presented with the following filter window:

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The screenshot shows a filter window with three main sections: 'Markbook Item:', 'Criteria:', and 'Value:'. Under 'Markbook Item:', there is a dropdown menu with 'Destination School' selected. Under 'Criteria:', there is a dropdown menu with 'is equal to' selected. Under 'Value:', there is a text input field with a vertical bar cursor and a dropdown menu with 'END' selected. At the bottom right, there are two buttons: 'OK' and 'Cancel'.

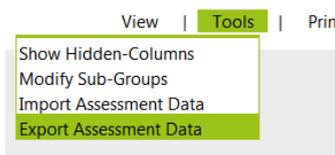
- 2.4 Now **set the filter** appropriately:
- > Select **Destination School** from the **Markbook Item** pull-down list
 - > Select **is equal to** from the **Criteria** pull-down list
 - > In the **Value** box, **type in one** of your destination DfE numbers
 - > click **OK**

After a few seconds, the markbook will only contain the pupils who have been assigned to the destination school you entered into the filter window.

You are now ready to create a transfer file for this destination school. Follow steps below.

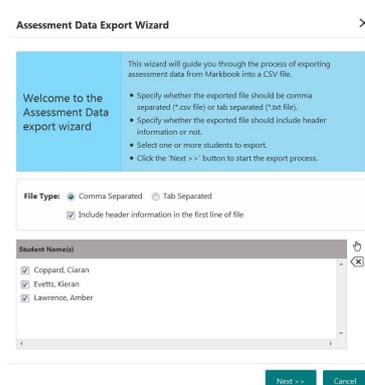
3. Create Y4 Transfer files for Middle or other schools

- 3.1 Take a few minutes to check that all the pupils are present in the markbook for the destination school selected.
- 3.2 To create the Y4 Transfer file for this filtered destination school, go to the **Tools** menu (top right of the markbook screen) and select **Export Assessment Data**



*Note: If you have made any changes to the markbook which have not been saved, you will be reminded to click **Save** before proceeding.*

You are presented with the following Assessment Data Export Wizard screen:



All the Year 4 pupils assigned to the filtered destination school should already be selected in the list.

- 3.3 Click **Next**

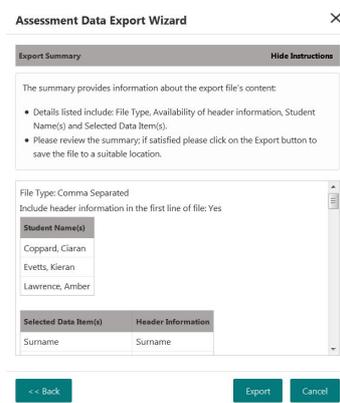
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The next window shows you that all of the data columns (bottom left section of the window) and all the contextual columns have been selected to be included in the transfer file as well as the UPNs, Surnames and Known names of the pupils.

3.4 Click **Next**

The final screen displays a summary of what was selected for the transfer file.



Assessment Data Export Wizard

Export Summary Hide Instructions

The summary provides information about the export file's content:

- Details listed include: File Type, Availability of header information, Student Name(s) and Selected Data Item(s).
- Please review the summary: if satisfied please click on the Export button to save the file to a suitable location.

File Type: Comma Separated
Include header information in the first line of file: Yes

Student Name(s)
Coppard, Claran
Evetts, Kieran
Lawrence, Amber

Selected Data Item(s)	Header Information
Surname	Surname

Back Export Cancel

3.5 Click **Export**

3.6 In the next window, select **Open with Microsoft Office Excel**.

Your Year 4 pupils and all the TA levels along with the contextual items will be listed.

This is your final opportunity to check that the data is all present and correct and the additional contextual items selected appear at the beginning of the spreadsheet.

3.7 Within Excel, click on **File > Save As...**

> **select an appropriate folder to save your Y4 Transfer file in** (or create a new folder called Y4 Transfers 2019 to save this file and subsequent files in)

> ensure that **Save As Type** displays CSV (Comma Delimited)

> enter filename as <yourschoolname> **Y4 Transfer 2019 to** <destination schoolname> (eg; AshwellLower Y4 Transfer 2019 to Faraway Middle)

> answer Yes to any saving and formatting prompts and close the file.

3.8 Going back to the Year 4 Transfer 2019 markbook, you now need to filter the next destination school and repeat the above steps **from step 2.3 above** for each of the remaining destination schools on your list.

When you have created a transfer file for each destination school, click **Back** to exit out of the markbook, saving any changes.

You are now ready to send the transfer files to your Middle or other destination schools: **see below**.

Send Transfer files to destination schools:

CBC Schools:

> Via Anycomms to other schools in Central Beds

> login to Anycomms and from the home menu select Send to an Organisation

> upload each transfer file (as previously named from the folder you saved them in (eg; AshwellLower Y4 Transfer 2019 to FarawayMiddle; AshwellLower Y4 Transfer 2019 to

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SomewherMiddle etc. – *there is no need to change the names of these transfer files*) >and select the appropriate Middle school **within CBC** to send to.

BBC Schools:

➤ **Via Anycomms to other schools in Bedford Borough**

- > login to Anycomms and from the home menu select Send to an Organisation
- > upload each transfer file (as previously named from the folder you saved them in (eg: *AshwellLower Y4 Transfer 2019 to FarawayMiddle*; *AshwellLower Y4 Transfer 2019 to SomewherMiddle* etc. – *there is no need to change the names of these transfer files*) >and select the appropriate Middle school **within BBC** to send to.

All schools: sending to schools in another authority

➤ **Via S2S to schools in other authorities**

> please **zip the transfer file and rename** the zip file as follows in the case of sending to a Bedford Borough school from a CBC school: **823dddd_822aaaa_Y4Transfer.zip** (where dddd=your DfE number and aaaa=destination school's DfE number). *The 822 relates to Bedford Borough – replace 822 with the appropriate LA number for the destination school*

- > Then logon to DfE Sign-in and select the **S2S** web site
 - > From the side menu, click on + next to Upload
 - > Select **Upload Generic File**
 - > Click Browse and locate the zipped transfer file (named as above)
 - > Click Upload File
- When the file has been sent, repeat as above for the next file or Logout.

Please contact the destination schools to let them know that you have sent a transfer file.

Well done – you have completed the Y4 Transfer process!