To be undertaken by the Integris Administrator

Stage 5 contains the following step:
1. Export Y4 TA data into an Excel csv (source) file onto the desktop
2. Link the Y4 Pupil Report template (Word document) to the Excel csv (source) file and merge the data to the report to create the individual Y4 TA reports for each pupil

1.   Export Y4 TA data into a Excel file

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

1.2   Click the **Open Markbook** icon

1.3   Go to the **Tools** menu (top right of the markbook screen) and select **Export Assessment Data**
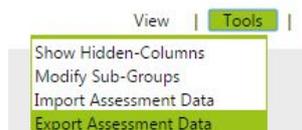
You are presented with the following Assessment Data Export Wizard screen:
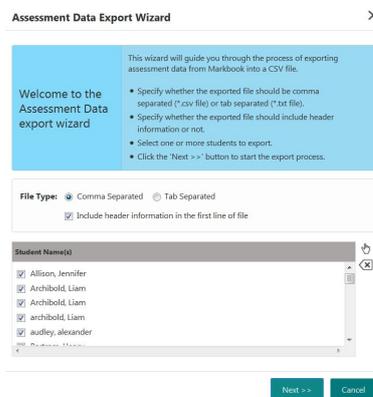
All the Year 4 pupils should already be selected in the list.

1.4   Click **Next**

The next window shows you that all of the data columns in the right pane that have been selected to be included in the export file.
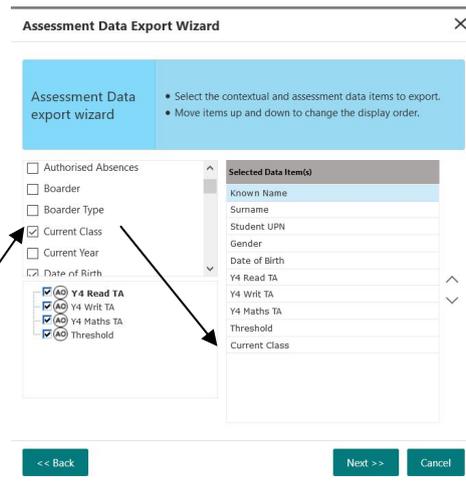
1.5   You MUST now select **Current Class** as an additional pupil item to be included in the extract file. In the top left section of the window, scroll down and **place a tick in the box for Current Class.**

*Current Class is now appended to the list of Selected Data items in the right hand pane. **Please take a moment to check that Current Class appears** at the bottom of this list before you continue.*

1.6   Click **Next**

The final screen displays a summary of what was selected for the export file.
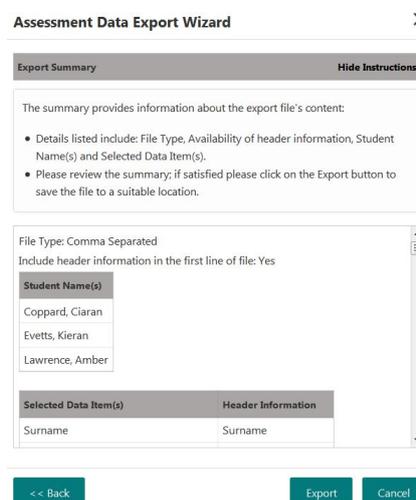
1.7   Click **Export**

1.8   In the next window, select **Open** with Microsoft Office **Excel.**
Your Year 4 pupils and the Y4 TA data along with the Current Class will be listed.

1.9   Now go to **File > Save As..**
        > select the Desktop as the location for the file
        > **enter Y42019TA** as the filename
        > the *Save as type* box should say 'csv'
        > Click **Save** and click **Yes** to any following message.

1.10   Finally, go to **File** menu in Excel > click **Close** and click **Yes** to any following prompts.

1.11   You can now minimise Integris and proceed with the next step.

Please note that you may have a more up-to-date version of Excel which will have differently formatted screens to the ones displayed below (Excel version 2003). The principles are the same however. You need to find the corresponding functions in the newer version.

2.   Link the Y4 TA Report template and create the reports

2.1   Download the Y4 Report (Word) template called **Y4_TA_2019_Report** (template) from the www.cbict.org.uk/Support/Summer Assessments/Y4 CBC web page and **save it on your Desktop**

2.2   Once downloaded, **open** the **Y4_TA_2019_Report (word)** document.
        You should see a SQL message which tells you the location it is set to look for the source file (i.e. your csv file with the data you saved in previous step).
        It should be looking for the file called *Y42019TA.csv* on your desktop.
        Click **Yes** at the SQL prompt.

        The file should now open and look similar to this with the field names appearing.

        < enter school name here >

        Year 4 Teacher Assessment Results 2017
        Age Related Expectations

        | Name: «Known_Name» «Surname» | Class: «Current_Class» |

        Teacher Assessment Results

        Reading   «Y4_Read_TA»

        Writing   «Y4_Writ_TA»

        Maths   «Y4_Maths_TA»

        Age Related Expectations key
        1 - Working Below the standard expected for their age
        2 – Working At the standard expected for their age

        If a *Find Data Source* prompt appears, please **click** on *Find Data Source* and navigate to the **Desktop** and select *Y42019TA.csv* file – otherwise continue with the next step.

2.3   Enter your school name at the top of the document (removing the existing text)

        Pls Note – you can of course change the TA key descriptions, style or layout of the template to suit your school's needs.

2.4   You may be able to see the Mailmerge menu options as below – if not, go to the **View** menu > **Toolbars** > select **Mailmerge**

2.5   Click on the **ABC** tool button on the Mailmerge toolbar to view the report with the data for the first pupil listed in your *Y42019TA.csv* file. You should see **1** appear in the record number box.

             Click on the blue arrow icon to the right of **1** to scroll to the record of the next pupil and so on - you will be able to see their details appear on the template document as if they were printed.

2.6   Click **Save**

             You are now ready to produce the Y4 TA pupil reports.

2.7   Click on the **Merge to New Document** button   and click OK for ALL records to be included.

2.8   You should now see a new **'Letters1' document** appear- note the number of pages created at the bottom of the document – *there should be a page for each pupil so the total number of pages should equal the total number of pupils you have in Year 4.*

2.9   Save this document as your **Y4 Individual TA Reports 2019** in your preferred folder.

2.10   Close **any remaining documents.**

You can now open the Y4 Individual TA Reports 2019 document and print off the reports.

Important!

When you have created the individual reports, please securely delete the Y42019TA.csv data source file from your desktop as this file is no longer required.

Please store the Y4 Individual reports in a secure location until such time as no longer required.