Note: These steps are to be undertaken by the Integris Administrator only.

Stage 1 steps cover the following:

1. Assign Reception Year pupils to their Key Stage and EYF Year 2021
2. Give relevant users access to Integris Assessment
3. Set up the NC Key Stage EYF 2021 for Early Adopters plan - copying the assessment plans for data entry
4. Assign the **NC EYF Early Adopters 2021** markbook to the relevant pupils/staff

1.   Assign Year Reception pupils to the EYF key stage and year for 2021

1.1   Go to **Administration** > **Speed Edit** > under *Area*, select **Current Key Stage** > click **Find** and select all your **Year Reception** pupils > ensure that all the pupils have a value of **EYF** (if not, edit them appropriately i.e. select EYF as new value; click *Select ALL* to select all the pupils; click **Apply Changes**; click **Save**).

1.2   Now keep the Year R pupils as your 'browse set', change the *Area* option to **Key Stage EYF Year** > ensure that all the pupils have a value of **2021** and edit appropriately if required (i.e. select 2021 as new value; click *Select ALL* to select all the pupils; click **Apply Changes**; click **Save**).

1.3   **Again**, keeping the Year R pupils as your 'browse set' , change the *Area* option to **Key Stage EYF End of Statutory Assessment** > ensure that all the pupils have a value of **Yes** > edit appropriately if required (i.e. check new value box; click *Select ALL* to select all the pupils; click **Apply Changes**; click **Save**).

1.4   Again, keeping the Year R pupils as your 'browse set' , change the *Area* option to **Key Stage EYF Tests Taken at Another School** > ensure that all the pupils have a value of **No** > edit appropriately if required (i.e. leave new value box unchecked; click *Select ALL* to select all the pupils; click **Apply Changes**; click **Save**).

1.5   Click **Exit** when you have completed the above changes to exit out of Speed Edit.

2.   Give relevant users (teachers) access to Assessment (*if not already users of Integris Assessment*)

2.1   Firstly, check that your Year R class(es) has been linked to the Year R teacher(s). Go to **General** > **Parameters** > **Class** > **View** > edit the class as appropriate and use the magnifying glass to find the staff member to assign to the Reception class.

Now check to see whether your Year R teacher(s) have access to Assessment

2.2   Go to **System Management > User Management** > select username > check the *Roles Assigned* window at the bottom right of the screen to ensure **Assessment** and **Assessment_Reports** have been assigned (if not, you need to add them now through **Add Role(s) to User(s)** icon).

2.3   Click **Close** to exit

3. Set up the NC Key Stage EYF 2021 for Early Adopters assessment plan for data entry

3.1   Go to **Modules** > **Assessment** > **Assessment Planning**

3.2   Expand the **Templates** folder by clicking on the Plus Symbol next to **Templates**

3.3   Then click on the Plus symbol next to **Key Stage**

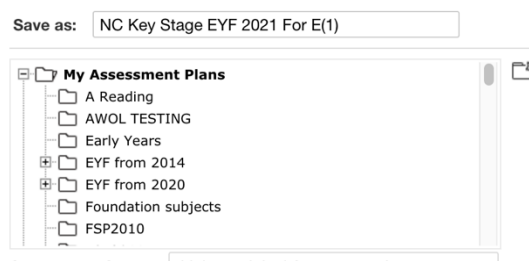3.4   Then click on the Plus symbol next to **2021** so the list looks similar to the example below :

3.5   Click on the NC Key Stage EYF 2021 for Early Adopters template name

3.6   Now click on **Copy** *(top right of screen)*

The following *Copy an Assessment Plan* **window appears**

3.7   Click + next to **My Assessment Plans** to reveal your folder list and select a folder called *Early Years* and go to step 3.8.
If you do not have an *Early Years* folder already, then click on the folder name *My Assessment Plans* to embolden it and then click on the **Create new folder** icon > enter **Early Years** as the **name** and click **OK.**

3.8   In the *Save as* box, the NC Key Stage EYF 2021 for E(1) template name will now appear - <u>**change the markbook name to the following: NC EYF Early Adopters 2021**</u>

3.9   Click **OK** on that screen and you will see your selected markbook in the folder you created under **My Assessment Plans > Early Years folder (**like the example below):
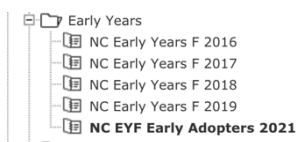
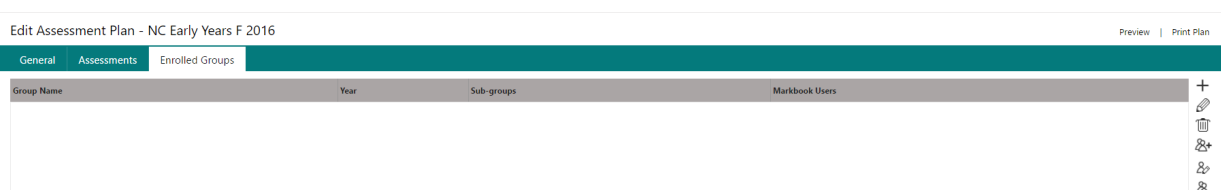You can now follow with step 4 to complete this process.

4.   **Assign the NC EYF Early Adopters 2021 markbook to the Year R pupils and relevant staff**

If continuing immediately from step above, go straight to 4.2, otherwise start at 4.1.

4.1   Staying in **Assessment** > **Assessment Planning** > expand the **My Assessment Plans** folder by clicking on the Plus symbol and then expand the **Early Years** folder by clicking on the Plus symbol next to it. You should see the copied **NC EYF Early Adopters 2021** markbook listed.

4.2   Highlight the **NC EYF Early Adopters 2021** markbook to be assigned and click the **Edit an Assessment Plan** icon

4.3   On the *Edit Assessment Plan* screen, click on the **Enrolled Groups** tab

4.4   Click the **Add an Enrolled Group** icon and you should see your classes with the teacher names linked to each class.

4.5   **Select the appropriate option below:**

> **If you have more than one class** in Year R, select the Year R class(es) that need to have EYF data entered - *you can use CTRL & Click to select more than one class* - and click **Add** for each one selected – then go to step 4.6

> **If you have a mixed year R/N class**(es), then go straight to step 4.6 and assign year groups instead of classes so that Year N pupils will not appear in the markbook.

> **If you have one class only** in year R, go to step 4.6 to assign the year group only

4.6   Staying on the Enrol Groups screen, change the *Enrolled Group Type* field to **Year Group** and select **Year Reception** and click **Add.** Then click **Close**. *This is useful if a) you have mixed year classes so that only the Year R pupils will appear in the markbook and b) you have more than one Year R class so that a teacher can view a copy of the markbook with all of the Year R pupils listed as well as individual classes.*

It may appear that nothing has happened but when you then click **Close** *to leave the* **Enrol Groups** *screen, the class(es) and the year group which you have chosen will now be listed on the* **Enrolled Groups** *screen. It will look something like this:*

Check at this point:
for schools with non mixed year classes you should have 'copies' of the EYF markbook for each class (with the class teacher listed under Markbook user) and a Year R group markbook which will not have any markbook

user listed as yet

for schools with mixed year classes you should have 'copies' of the EYF markbook for a Year R group which will not have any markbook user listed as yet

Now you need to assign additional users who need access to each Year R class markbook and/or to the complete Year R markbook.

4.7   Select a markbook from the list and click on the **Markbook Users** icon.
(for example, a class teacher of a mixed year class will need access to the Year R markbook so that data can be entered for the relevant Year R pupils only in the class)

All the staff users to whom you have given Assessment as one of their roles will be listed.

4.8   Highlight all of the members of staff who **will need access** to the markbook selected – hold down the **Ctrl key** to make multiple entries - and then click **OK.**

4.9   Then click **Save** when you have finished.

4.10 As a final check, it is a good idea to see how the markbooks will appear for data entry. Go to **Modules** > **Assessment** and **Markbook** > select a user and click the plus symbol next to their name > *you should now see copies of NC EYF Early Adopters 2021 markbook(s) listed for their Yr R class and/or a copy for the year*

group Reception > select a markbook from the list and click on **Open a markbook** icon to view it.

Each user you have assigned to each markbook in step 4.7 above will be able to view these markbooks in the same way when they login and will be able to enter data directly into them..