



## **Refreshing your classes for the new school year:** **BULK DATA METHOD**

Use this method if you are a large school and/or your registration classes are being mixed as they move up. *If the classes are not being mixed up, please get in touch for details of our 'Transition' method.*

Please use the below step-by-step instructions or watch this ['HOW TO REFRESH YOUR DATA' VIDEO](#)

### **IMPORTANT – BEFORE YOU START**

**The data file you upload will instantly overwrite your current setup so:**

- **Complete this when you are ready for the new setup to be active (e.g. at the end of the Summer term or at the start of the Autumn term) and your MIS (e.g. SIMS, Arbor) has rolled the classes over to the new academic year.\***

*\*No UPNs for the new intake yet? You can complete the refresh for all other classes, then add the new pupils at a later date. See our [Adding Reception/Nursery pupils video](#).*

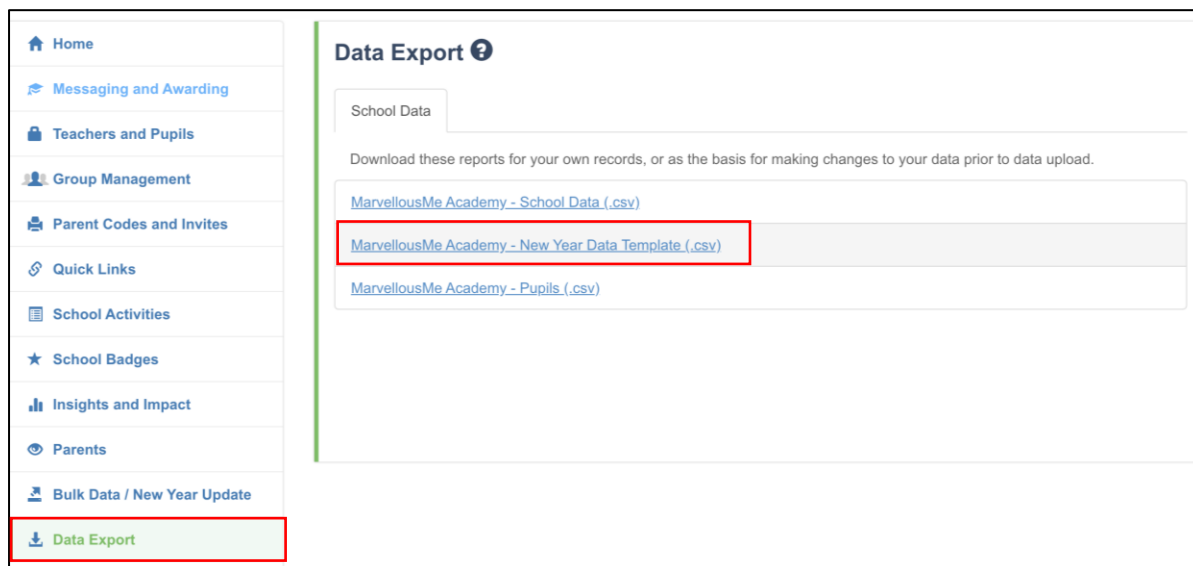
- **Ensure you include your whole school data (i.e. all staff and pupils, not just new joiners).**
- **MarvellousMe schools use a range of MIS (e.g. SIMS, Arbor) so we have put together this useful [Name Configurator](#) to format the children's names as required for our data file.**

If you have any questions or find the process is taking more than 15-20 minutes please contact the us on 01273 900 202 or [support@marvellousme.com](mailto:support@marvellousme.com).

## Step-by-Step Instructions: Bulk Data Method

### Step 1: Check the current staff set up in MarvellousMe.

Download and review the 'New Year Data Template' file in the 'Data Export' section of the Admin system.



Spread out the columns and check the details for the existing staff are correct. **NB – You add new staff members in a later step.**

#### a) To change any staff names and/or email addresses:

- Go to 'Teachers and Pupils'.
- Type their name into the search box.
- Tap 'Edit'.
- Change their details as necessary then tap 'Save Changes'.

#### b) Remove staff that have left.

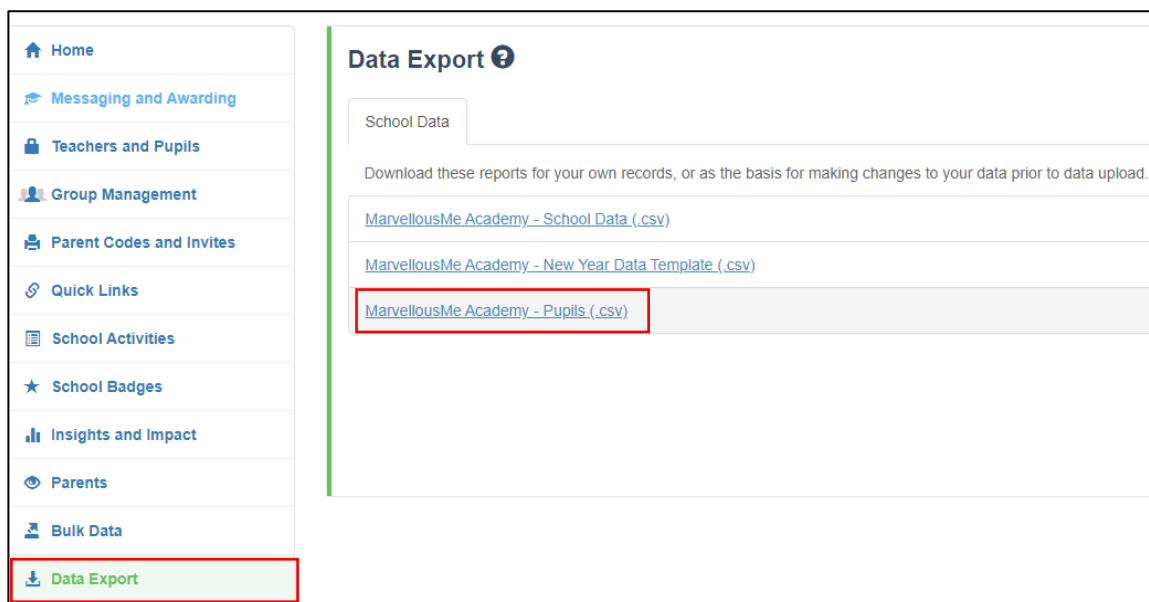
- Go to 'Teachers and Pupils'.
- Search for the teacher by typing their name into the search box.
- Tap 'Delete' and confirm.

### Step 2: **IMPORTANT** Identify any pupils that have been set up using a fake UPN.

Go into the 'Data Export' section of the Admin system and download and review the 'Pupils' file.

If any child was added to MarvellousMe with a fake/temporary UPN (this should be easy to identify), **you must update it to the correct UPN:**

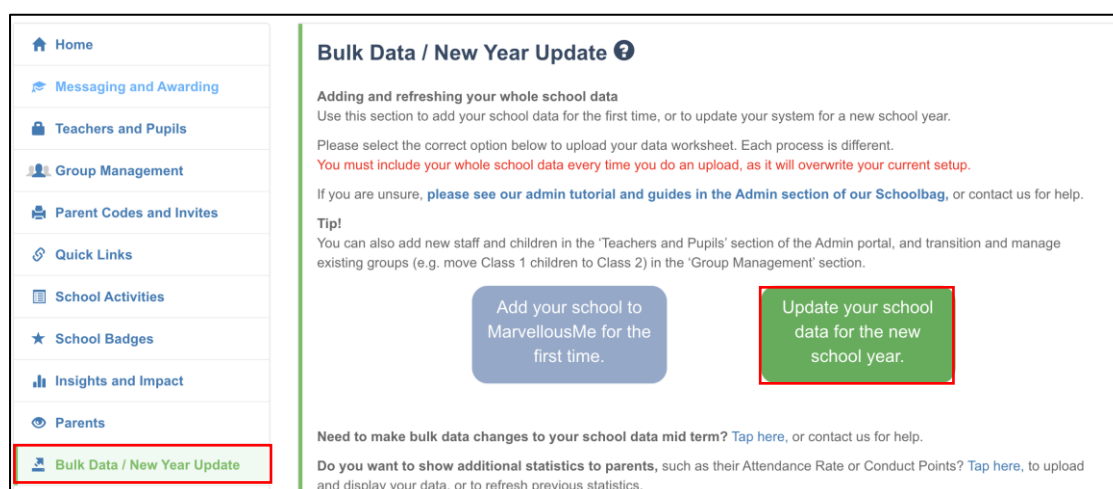
- Go to 'Teachers and Pupils'.
- Search for the pupil by typing their name into the search box.
- Tap 'Edit'.
- Change the UPN and save.



If you don't correct any fake UPNs, these children will be removed and re-added to MarvellousMe meaning their parents will need to link to a new join code and any previous history could be lost.

### Step 3: Download your New Year Data file.

In the Admin portal, go to the 'Bulk Data / New Year Update' section and click on the green button titled 'Update your school data for the new school year'.



### Step 4: Save the downloaded data file to your desktop, or other folder.

Resize the column widths so that you can see the column headers properly. **Please keep it as a .csv file type and do not change the column headers.**

	A	B	C	D	E	F
1	STAFF NAME	STAFF EMAIL	CHILD NAME	UPN	REG GROUP	MAIN TEACHER EMAIL
2	Mrs Smith	smith@fakeemail.com				
3	Mr Taylor	taylor@fakeemail.com				
4	Miss Anderson	anderson@fakeemail.com				
5	Miss Thomas	thomas@fakeemail.com				
6	Mr Jackson	jackson@fakeemail.com				
7	Mrs White	white@fakeemail.com				
8	Mrs Harris	harris@fakeemail.com				
9	Mrs Martin	martin@fakeemail.com				
10	Miss Thompson	thompson@fakeemail.com				
11	Miss Garcia	garcia@fakeemail.com				
12	Miss Martinez	martinez@fakeemail.com				
13	Mrs Johnson	johnson@fakeemail.com				
14	Mrs Robinson	robinson@fakeemail.com				
15	Mr Williams	williams@fakeemail.com				
16						

### Step 5: Add new staff

Type the name and email address for any new staff members into columns A and B. Once the file is uploaded, a 'Teacher' account will automatically be created for them.

### Step 6: Collate the pupil data from your MIS for all the children you want to be active in MarvellousMe.

You will need to run a report on your school's MIS **for the whole school\*** with these filters / data columns, in this order:

- *Child first name and last name\*\**
- UPN
- *Reg Group*

\*If you are still waiting to receive the UPNs for the new cohorts (e.g. Nursery, Reception) please complete the data refresh for all other pupils now. The new pupils can be added as a group at a later date using the [Adding Reception/Nursery pupils](#) video.

\*\*If your MIS reports the pupil's names in a different format, please use our [Name Configurator](#) to reformat them correctly for MarvellousMe. There is also a [video guide](#) for this or contact us for help.

Sort your report by Reg Group, either in the MIS system, or in your output file.

Output the report from your MIS to Excel.

Copy and paste all the details into columns **C, D and E** of your saved 'New School Year data' file.

NB. Save your file, keeping it as a **.csv file type**.

	A	B	C	D	E	F
1	STAFF NAME	STAFF EMAIL	CHILD NAME	UPN	REG GROUP	MAIN TEACHER EMAIL
2	Mrs Smith	smith@fakeemail.com	Aiden Brace	Fakeupn001	Reception	
3	Mr Taylor	taylor@fakeemail.com	Amy Andrews	Fakeupn002	Reception	
4	Miss Anderson	anderson@fakeemail.com	Ava Allemandy	Fakeupn003	Reception	
5	Miss Thomas	thomas@fakeemail.com	Cara Cook	Fakeupn004	Reception	
6	Mr Jackson	jackson@fakeemail.com	Ellie Joshua	Fakeupn005	Reception	
7	Mrs White	white@fakeemail.com	Elliott Marsh	Fakeupn006	Reception	
8	Mrs Harris	harris@fakeemail.com	Gabriel Balaam	Fakeupn007	Reception	
9	Mrs Martin	martin@fakeemail.com	Harrison Gibbs	Fakeupn008	Reception	
10	Miss Thompson	thompson@fakeemail.com	Harry Jardine	Fakeupn009	Reception	
11	Miss Garcia	garcia@fakeemail.com	Henry Knapp	Fakeupn010	Reception	
12	Miss Martinez	martinez@fakeemail.com	Alexandra Gardner	Fakeupn011	Year 1	
13	Mrs Johnson	johnson@fakeemail.com	Alexandra Grace-Gibbs	Fakeupn012	Year 1	
14	Mrs Robinson	robinson@fakeemail.com	Cecilia Cunneen	Fakeupn013	Year 1	
15	Mr Williams	williams@fakeemail.com	Ciara Gilbey	Fakeupn014	Year 1	
16			Ellie Jardine	Fakeupn015	Year 1	
17			Emma Roberts	Fakeupn016	Year 1	
18			Erin Southgate	Fakeupn017	Year 1	
19			Ethan Oliver	Fakeupn018	Year 1	
20			George Cook	Fakeupn019	Year 1	
21			Harrison Gibbs	Fakeupn020	Year 1	
22			Amelia Hall	Fakeupn021	Year 2	
23			Anna Noah	Fakeupn022	Year 2	
24			Archie Wharfe	Fakeupn023	Year 2	
25			Charlotte Costa	Fakeupn024	Year 2	
26			Christopher Freeman	Fakeupn025	Year 2	
27			Emily Edgar	Fakeupn026	Year 2	
28			Ethan Knight	Fakeupn027	Year 2	
29			Gareth Brett	Fakeupn028	Year 2	
30			Harry Healey	Fakeupn029	Year 2	
31			Harry Jones	Fakeupn030	Year 2	
32			Arabella Shone	Fakeupn031	Year 3	
33			Chloe Elliott	Fakeupn032	Year 3	
34			David Gough	Fakeupn033	Year 3	
35			Elizabeth Hall	Fakeupn034	Year 3	
36			Erin Skinner	Fakeupn035	Year 3	
37			Eva Sexton	Fakeupn036	Year 3	
38			Erin Southgate	Fakeupn037	Year 3	

## Step 6: Assign the main teacher for each class (Column F)

Copy the **email address** of just the main class teacher, in column B, and paste it into column F next to the name of their appropriate Reg. group. Click and drag to copy this down the list until the end of the group.

You can assign additional staff (e.g. the second teacher in a job share, school leaders, specialist subject teachers) to the same group after the data file has been uploaded.

	A	B	C	D	E	F
1	STAFF NAME	STAFF EMAIL	CHILD NAME	UPN	REG GROUP	MAIN TEACHER EMAIL
2	Mrs Smith	smith@fakeemail.com	Aiden Brace	Fakeupn001	Reception	smith@fakeemail.com
3	Mr Taylor	taylor@fakeemail.com	Amy Andrews	Fakeupn002	Reception	smith@fakeemail.com
4	Miss Anderson	anderson@fakeemail.com	Ava Allemandy	Fakeupn003	Reception	smith@fakeemail.com
5	Miss Thomas	thomas@fakeemail.com	Cara Cook	Fakeupn004	Reception	smith@fakeemail.com
6	Mr Jackson	jackson@fakeemail.com	Ellie Joshua	Fakeupn005	Reception	smith@fakeemail.com
7	Mrs White	white@fakeemail.com	Elliott Marsh	Fakeupn006	Reception	smith@fakeemail.com
8	Mrs Harris	harris@fakeemail.com	Gabriel Balaam	Fakeupn007	Reception	smith@fakeemail.com
9	Mrs Martin	martin@fakeemail.com	Harrison Gibbs	Fakeupn008	Reception	smith@fakeemail.com
10	Miss Thompson	thompson@fakeemail.com	Harry Jardine	Fakeupn009	Reception	smith@fakeemail.com
11	Miss Garcia	garcia@fakeemail.com	Henry Knapp	Fakeupn010	Reception	smith@fakeemail.com
12	Miss Martinez	martinez@fakeemail.com	Alexandra Gardner	Fakeupn011	Year 1	white@fakeemail.com
13	Mrs Johnson	johnson@fakeemail.com	Alexandra Grace-Gibbs	Fakeupn012	Year 1	white@fakeemail.com
14	Mrs Robinson	robinson@fakeemail.com	Cecilia Cunneen	Fakeupn013	Year 1	white@fakeemail.com
15	Mr Williams	williams@fakeemail.com	Ciara Gilbey	Fakeupn014	Year 1	white@fakeemail.com
16			Ellie Jardine	Fakeupn015	Year 1	white@fakeemail.com
17			Emma Roberts	Fakeupn016	Year 1	white@fakeemail.com
18			Erin Southgate	Fakeupn017	Year 1	white@fakeemail.com
19			Ethan Oliver	Fakeupn018	Year 1	white@fakeemail.com
20			George Cook	Fakeupn019	Year 1	white@fakeemail.com
21			Harrison Gibbs	Fakeupn020	Year 1	white@fakeemail.com
22			Amelia Hall	Fakeupn021	Year 2	harris@fakeemail.com
23			Anna Noah	Fakeupn022	Year 2	harris@fakeemail.com
24			Archie Wharfe	Fakeupn023	Year 2	harris@fakeemail.com

## Step 7: Checklist

- Have you listed all the staff you want to use MarvellousMe?
- Have you included all pupils at the school? (New pupils can be added later if you don't have their details yet).
- Have you shown each child's first and last name correctly, both together in column C?
- Does each child have a UPN? If not, you will need to add them manually when they do.
- Have you sorted by Reg. Group?
- Have you added one email for the main teacher next to each child's Reg Group?
- Have you left the column headers unchanged?

Once you have completed the checklist, please save your file. Again, keeping it in the .csv file format.

Please now securely send your completed data file to [support@marvellousme.com](mailto:support@marvellousme.com) for us to check and upload for you. We will confirm receipt of your file and notify you when it has been uploaded so you can complete the Final Actions (see page 13).

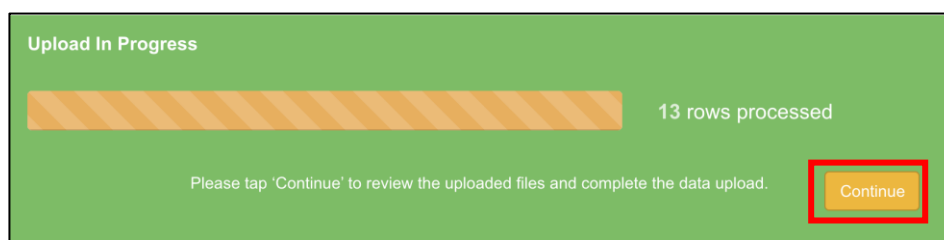
Alternatively, continue to Step 8 to upload the completed data file to your account yourself.

## Step 8: Upload your completed data file into your Admin system.

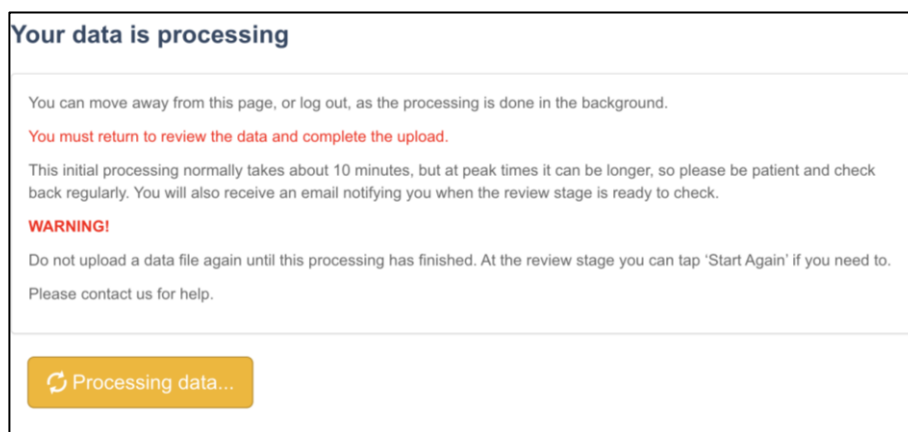
**Reminder: When uploaded, the data file will instantly overwrite your current setup and cannot be reversed, so please contact us with any questions or send us your completed data file for us to check over.**

### To upload the file:

- Return to the 'Bulk Data' section of the Admin system.
- Click the green 'Upload Data File' button.
- Select your saved csv data file.
- Wait until you see the below screen, then click 'Continue'.



**Step 9: The system will display the below screen whilst it pulls through your data. You must then return to review it and complete the upload.**



### **Step 10: Review your Teachers' and Pupils' details.**

In this review section you should see all the people you want active in MarvellousMe for your whole school.

#### **Spot check:**

Are the majority of pupils 'UPDATING'? Only the new pupils/teachers should be 'Adding'.

**Tip** You can tap the column headers to sort the data and change the number of entries visible.

If you are unsure about anything, tap 'Start Again' and check your data file, or contact us for help.

If everything looks correct, tap 'Review Groups'.

## School Data

You are here: / [1. Review Teachers and Pupils](#)
Start Again

### 1. Teachers and Pupils

Please review your teachers' and pupils' details. You should see all the people you want active in MarvellousMe for your whole school.

Spot check the names and unique IDs are accurate and in the correct columns. You can tap the column headers to sort the data.

If there is a new unique ID (i.e. staff email or child UPN) for anyone new, or previously setup in MarvellousMe, it will show as 'Adding', others will be 'Updating'.

If you are unsure about anything, tap 'Start Again' and check your data file, or contact us for help.

If everything looks correct, tap 'Review Groups'.

Show 10 entries
Search:

Name	Role	Unique ID	Action
Aaliyah Banks	Pupil	FAKECHILD001	Updating
Aaron Fisher	Pupil	FAKECHILD002	Updating
Abigail Long	Pupil	FAKECHILD003	Updating
Adam Bradley	Pupil	FAKECHILD004	Updating
Addison George	Pupil	FAKECHILD005	Updating
Adeline Norman	Pupil	FAKECHILD006	Updating
Adrian Knight	Pupil	FAKECHILD007	Updating
Aiden Turner	Pupil	FAKECHILD008	Updating
Alexa Stanley	Pupil	FAKECHILD009	Updating
Alexander Hall	Pupil	FAKECHILD010	Updating

Showing 1 to 10 of 163 entries

Previous
1
2
3
4
5
...
17
Next

1. Teachers and Pupils

Next: 2. Review Groups

## Step 11: Review your Group details.

You should see all the groups/classes you want active in MarvellousMe for your whole school. Check the correct staff email address is shown for each group. Remember, if you need to assign other staff to the same group, you can do this after the data upload.

If you are unsure about anything, tap 'Start Again' and check your data file, or contact us for help.

If everything looks correct, tap 'Review Group Members'.



## School Data

You are here: /
[1. Review Teachers and Pupils](#)
/
[2. Review Groups](#)

Start Again

2. Groups

Please review your groups. You should see all the groups you want active in MarvellousMe for your whole school.

Check the correct staff email address is shown for each group.

If you need to assign other staff to the same group, you can do this after the data upload.

If you are unsure about anything, tap 'Start Again' and check your data file, or contact us for help.

If everything looks correct, tap 'Review Group Members'.

Show 10 entries
Search:

Group	Main Teacher ID	Action
Class 1	mark@marvellousme.com	Updating
Class 2	MissClass2@faketeacher.com	Updating
Class 3	MrsClass3@faketeacher.com	Updating
Class 4	MrClass4@faketeacher.com	Updating
Class 5	MissClass5@faketeacher.com	Updating
Class 6	MrsClass6@faketeacher.com	Updating
Nursery	MrsNursery@faketeacher.com	Updating
Reception	Mrsreception@faketeacher.com	Updating
Group	Main Teacher ID	Action

Showing 1 to 8 of 8 entries

Previous
1
Next

2. Groups

Back
| Next:
3. Review Group Members

## Step 12: Review your Group Members (the children in each group).

You should see all the children in all the groups for your whole school.

Spot check groups to make sure the correct pupils are showing.

If you are unsure about anything, tap 'Start Again' and check your data file, or contact us for help.

If everything looks correct, tap 'Review Errors'.

## School Data

You are here: /
 [1. Review Teachers and Pupils](#) /
 [2. Review Groups](#) /
 [3. Review Members](#)

Start Again

### 3. Group Members (Children)

Please review the children in each group.

Spot check groups to make sure the correct pupils are showing.

If you are unsure about anything, tap 'Start Again' and check your data file, or contact us for help.

If everything looks correct, tap 'Review Errors'.

Show 10 entries
 Search:

Group	Child Name	Action
Class 1	Tristan Parsons	Updating
Class 1	William Brown	Updating
Class 1	Skylar Todd	Updating
Class 1	Sarah Clayton	Updating
Class 1	Valentina Preston	Updating
Class 1	Wyatt Harrison	Updating
Class 1	Sophia Sharp	Updating
Class 1	Vincent Hudson	Updating
Class 1	Sawyer Perry	Updating
Class 1	Zachary Lowe	Updating
Group	Child Name	Action

Showing 1 to 10 of 210 entries
 Previous
 1
2
3
4
5
 ...
 21
 Next

3. Group Members (Children)

Back
 | Next:
 

4. Review Errors

### Step 13: Check for any errors.

If you are unsure about anything, tap 'Start Again' and check your data file, or contact us for help.

If everything looks correct, tap 'Final Validation'.

## School Data

You are here: / 1. Review Teachers and Pupils / 2. Review Group / 3. Review Members / 4. Review Errors
Start Again

### 4. Errors

Please check for any errors.

If you are unsure about anything, tap 'Start Again' and check your data file, or contact us for help.

If everything looks correct, tap 'Final Validation'.

Show 10 entries
Search:

Teacher Name	Email	Pupil Name	UPN	Group Name	Error
Well done! No errors spotted.					
Teacher Name	Email	Pupil Name	UPN	Group Name	Error

Showing 0 to 0 of 0 entries
Previous
Next

4. Errors

Back
Next
5. Final Validation

**Step 12: Check the final summary of how many staff, children and groups will be active in MarvellousMe after this upload.**

Please check and go back through the review stages if necessary.

If you are unsure about anything, tap 'Start Again' and check your data file, or contact us for help.

If everything looks correct, tap 'Finish Upload'. **This cannot be undone, so only do it when you want your new data to become active.**

## School Data

You are here: / 1. Review Teachers and Pupils / 2. Review Groups / 3. Review Members / 4. Review Errors / 5. Final Validation

Start Again

### School Data Validation Report

Here is a final summary of how many staff, children and groups will be active in MarvellousMe after this upload.

Please check and go back through the review stages if necessary.

If you are unsure about anything, tap 'Start Again' and check your data file, or contact us for help.

If everything looks correct, tap 'Finish Upload'. **This can't be undone, so only do it when you want your new data to become active.**

#### Current Data

13 Teachers	180 Pupils	8 Groups	240 Child Members
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#### With This Upload


13 Teachers	150 Pupils	8 Groups	210 Child Members
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5. Proceed & Overwrite Current Data

Back Finish Upload

**Step 14: You will see the below pop-up screen confirming that you have completed the data review.**

### Nearly there!



**Nearly there!** The final stage of your data upload is being processed.

**Do not make any further changes to staff, children or groups in the Admin system until this processing has finished. If you do, they will be overwritten by this upload.**

**Do not upload a data file again until this processing has finished.**

You can move away from this page, or log out, as the processing is done in the background.

This final processing normally takes about 30 minutes, but at peak times it can be over an hour, so please be patient and check back regularly.

You will also receive an email notifying you when the upload is complete. This will include the username and password for any new staff added to MarvellousMe, to pass on to them. Please also check your junk email.

After the upload, you will be able to assign staff to other groups, and print the parent join code letters for parents still to join up to MarvellousMe.

See our detailed instructions and post upload checklist in the Admin section of our Schoolbag.

Click here to return to the dashboard

The upload will now be processed behind the scenes. You can move away from this page or log out however **you must not make any further changes to staff, children or groups in the Admin system until the processing has finished.** If you do, they will be overwritten by this upload.

Please also **do not upload a data file again.**

This final processing stage normally takes about 30 minutes, but at peak times it can be over an hour, so please be patient and check back regularly.

You will also receive an email notifying you when the upload is complete. You may find this goes into your junk mail inbox.

## **FINAL ACTIONS**

Once you have completed the above steps, you are nearly done! There are just a few important final actions. Please follow the below step-by-step instructions and/or watch this [SHORT VIDEO](#).

1. **The passwords for any new staff you included on your uploaded data file** will be sent to the email address you use as your username when logging in to your Admin account. Please share these with the staff. Existing staff will keep their login details from last year. Their
2. **Check all staff have been assigned to their respective groups (including job shares, school leaders, TAs etc.)**
  - Go into 'Teachers and Pupils'.
  - Enter the staff member's name in the search box.
  - Tap 'Edit'.
  - Tap the 'Groups' tab.
  - Tick the classes/groups they need to use MarvellousMe with.
3. **Print the parent join code letters for all parents who have not joined up to MarvellousMe, including the new starters.**
  - Go to 'Parent Codes and Invites'.
  - Select 'Parents Still to Join' in the 'Usage' filter.
  - Choose one Group at a time in the 'Classes/Groups' filter.
  - Print the letters, one Group at a time.
  - Give the letters to the teachers to hand out. For security, the letters should ideally be put in named envelopes. **CONTACT MARVELLOUSME IMMEDIATELY IF THE JOIN CODE LETTERS ARE GIVEN OUT TO THE WRONG CHILDREN/PARENTS.**

Please print reminder letters using the above steps until you feel that you have your maximum number of the parents joined up. As a benchmark, most schools see 90% of parents engaged. Click here for our [tips to get more parents signed up](#).

4. **Check all staff are set to receive the weekly performance summary email.**
  - Go to 'Insights and Impact'.
  - Tap 'Weekly Snapshot Recipients'.
  - Tick the staff you want to receive the weekly email. To encourage best practice and consistency, we recommend this feature is set up for the school leaders and main class teachers.
5. **Check/Add Quick Links.**
  - Go to 'Quick Links'.
  - Check the existing links are up to date and edit accordingly. Tap the green disk to save your changes.
  - Add custom Quick Links to make it easy for parents to access important information such as:
    - Your school's social media sites
    - Class Pages/Blogs

- External services (e.g. payment gateways, school meal providers, after school clubs)
- Contact email addresses for the school office and/or staff.
- To add a new custom Quick Link, simply type the link's name, choose an icon, paste the URL and select which class/classes the link applies to.

**6. For GDPR purposes, please send a quick email to [support@marvellousme.com](mailto:support@marvellousme.com) to let us know you have refreshed your data.**

Please also notify us of any changes to your school's MarvellousMe Administrator and/or Leader.

**You're done! Thank you for updating MarvellousMe 😊**