



How to update your classes for the new school year: **TRANSITION METHOD**

This 'transition' method is ideal for schools where registration classes are not being mixed up, e.g. pupils in Reception move into Year 1 and so on. *If the classes are being mixed up, please contact us for instructions to our alternative method.*

Please follow the below step-by-step instructions and/or watch this 10 minute ['HOW TO REFRESH YOUR DATA' VIDEO](#).

IMPORTANT – BEFORE YOU START:

- **Only transition your classes when you want the new setup to be active, i.e. at the very end of the Summer term or at the start of the Autumn term (a job for an Inset/Admin day).**
- **No UPNs for the new intake yet? You can transition all other classes, then add the new pupils at a later date. See our [Adding Reception/Nursery pupils video](#).**

If you have any questions or find the process is taking more than 15-20 minutes, please contact the MarvellousMe Support Team on 01273 900 202 or support@marvellousme.com.

Step-by-Step Instructions: Transition Method

Step 1: Check and update the staff set up in MarvellousMe.

Go into the 'Data Export' section of the Admin system and download and review the 'New Year Data Template' file.

a) Check the details for the existing staff are correct.

To make any changes (e.g. married name, email address):

- Go to 'Teachers and Pupils'.
- Search for the teacher by typing their name into the search box.
- Tap 'Edit'.
- Change the details as necessary.
- Tap 'Save Changes'.

b) To add new staff.

- Go to 'Teachers and Pupils'.
- Tap 'Add Teacher'.
- Enter their name, staff email, select the group(s) they will need to use MarvellousMe with and create a password for them (keep a record of this as you will need to pass this on to them with the training resources).
- Tap 'Create Teacher'.

c) 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 previously been set up using a fake/temporary UPN and update them.**

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.

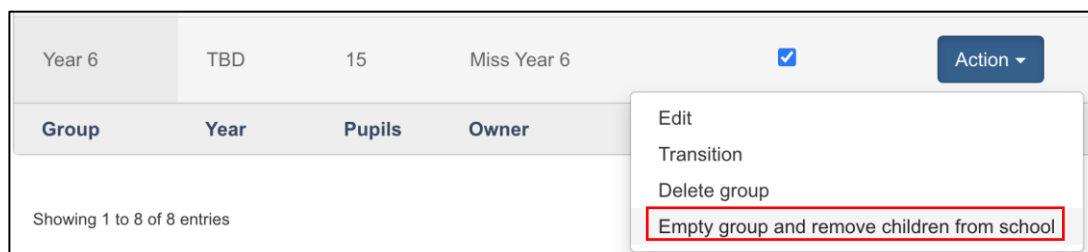
Go into the 'Data Export' section of the Admin system and download and review the 'Pupils' file.

If any child was added to MarvellousMe with a fake UPN (this should be easy to identify), you must change 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.

Step 3: Remove leavers (e.g. Year 6 pupils) in bulk.

- Go to 'Group Management'.
- Tap 'Action' to the right-side of the group you want to empty.
- Select 'Empty group and remove children from school' and confirm. This deletes the children completely from MarvellousMe but leaves the group as an empty shell.



Step 4: Transition pupils to their new class.

- Go to 'Group Management'.
- Tap 'Action' to the right side of the group you want to transition (e.g. Year 5) into the empty shell.
- Tap 'Transition'.
- Select the class name your group is to be moved in to (e.g. Year 6).
- Tap 'Next', then 'Transition Group'. The pupils will have been moved into their new class.

Repeat step 4 for the other classes, transitioning each one to the empty class shell created beforehand.

IMPORTANT – Work methodically from the oldest to youngest classes, e.g.

- Transition last year's Year 4 group into the Year 5 shell, emptying Year 4.
- Transition last year's Year 3 group into the Year 4 shell, emptying Year 3.
- Transition last year's Year 2 group into the Year 3 shell, emptying Year 2, and so on.

IMPORTANT – Be careful to select '**Transition**' not 'Delete Group' or 'Empty group and remove children from the school'.

Year 5	TBD	27	Mrs Smith	<input checked="" type="checkbox"/>	Action ▾
Year 6	TBD	15	Miss Year 6		
Group	Year	Pupils	Owner		

Showing 1 to 8 of 8 entries

Previous 1 Next

- Edit
- Transition
- Delete group
- Empty group and remove children from school

Transition group: Year 5 ✕

Select the new group that you want to transition this group to.

- Nursey
- Reception
- Year 1
- Year 2
- Year 3
- Year 4
- Year 6

Cancel Next

Transition group: Year 5 ✕

Confirm the pupils that you want to move into the new group.

Select/Deselect All

- Molly
- Jo
- Kate
- Miller
- Molly
- Jo
- Kya

Cancel Transition Group

Step 5: Add on your new intake (e.g. Nursery or Reception).

IMPORTANT We recommend you only add pupils when you have their official UPN. Contact us if you need any further advice on this.

If you are completing this step at a later date, see instructions below or watch this 4 minute [YouTube video](#).

- Download a report from your MIS (e.g. SIMS, Arbor) with these filters:
 - Column A = First and last names of all the children in the group that you want to add to MarvellousMe.
 - Column B = Their UPN.
 - Column C = Their Reg Group.

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.

- Go to 'Group Management'.
- Tap 'Action' next to the group you want to add the new intake to (e.g. Nursery, Reception).
- Tap 'Edit'.
- Tap the 'Add Pupils' button.
- Select the option 'Add pupils by pasting a .csv list' and read the screen instructions carefully.
- Go back to your spreadsheet and select **just** the children's names and UPNs.
- Copy the data selected, then open up your MarvellousMe screen and paste the data into the box.
- Tap 'Next'.
- Check the pupil list and tap 'Create and Add pupils'.

Group	Year	Pupils	Owner	Include in Export	Actions
Nursey	TBD	0	Miss Nursery	<input checked="" type="checkbox"/>	Action ▾
Reception	TBD	10	Mrs. Reception		<div style="border: 1px solid red; padding: 2px;"> Edit </div> Transition Delete group Empty group and remove children from school
Year 1	TBD	4	Miss Nursery		

Showing: Pupils Add Pupils Select/Deselect All

Show 10 entries

Add pupils by pasting a .csv list

Pupil	Include	Edit	Remove
No data available in table			
Pupil	Include	Edit	Remove

Create and add Pupils to Nursey
✕

You can add pupils to this group by copying and pasting their details from your school's main administration system, e.g. SIMS.

- Create a report in your administration system showing the forename and surname, and UPN, of the pupils that you want to add to this group.
- Output your report to Excel.
- Then, select the cells containing the names and UPNs of the pupils, and copy and paste them below.

Adding pupils in this way will also create them in the MarvellousMe system, if they have not been previously added, so it's ideal for new intake.

Michelle Topman FAKEUPN023
 Benjamin Griffith FAKEUPN033
 Catherine Wright FAKEUPN025
 Melanie Dawson FAKEUPN027
 Ava Wiseman FAKEUPN029
 Pippa Rickett FAKEUPN020
 Noah FAKEUPN032
 Millii Jacobs FAKEUPN024
 Mia Mia FAKEUPN034
 Suzaane Ward FAKEUPN026
 Kate Hall FAKEUPN028
 Emily Hare FAKEUPN030

Cancel Next

Create and add Pupils to Nursey
✕

Below is the list of pupils that will be added to this group.

Tap 'Create and Add' pupils to confirm.

Please remember to print parent join code letters, from the Parent Codes and Invites section, for any new children added to MarvellousMe.

- Michelle Topman (FAKEUPN023)
- Benjamin Griffith (FAKEUPN033)
- Catherine Wright (FAKEUPN025)
- Melanie Dawson (FAKEUPN027)

Cancel Create and Add pupils

Step 6: Update group names and change the owner (if needed).

To edit a group name:

- Go to 'Group Management'.
- Select 'Action' to the right-side of the group.
- Tap 'Edit'.
- Amend the name as required and save.

To edit the lead teacher (i.e. Owner) for a group:

- Go to 'Group Management'.
- Select 'Action' next to the group you want to edit.
- Tap 'Edit'.
- Tap the 'Teachers' tab (under the Group Name).
- Tap the 'Owner' circle next to the new owner's name.
 - If you can't see their name, tap the green 'Add Teachers' button (top-right) to find them, tap the 'Owner' circle next to their name, then tap 'Add' at the bottom of the box.
- When you are back in the 'Group Members' screen, tap 'Save Changes'.

Group Members

You are here: / Group Management / Group Members

Group Name

Year 4

Group Year

TBD

Save Changes

Pupils

Teachers

Showing: Teachers

Add Teachers

Show 10 entries

Search:

Teacher	Owner	Edit	Remove
Mrs. Year 4	<input checked="" type="radio"/>	Edit	Remove
Teacher	Owner	Edit	Remove

Showing 1 to 1 of 1 entries

Previous 1 Next

Save Changes

Add Teachers

Showing: Available Teachers

Select/Deselect All

Show 10 entries

Search:

Teacher	Owner	Add
School Office	<input type="radio"/>	<input type="checkbox"/>
Mrs. Year 5	<input type="radio"/>	<input type="checkbox"/>
Mrs. Year 4	<input type="radio"/>	<input type="checkbox"/>
Mrs. Reception	<input type="radio"/>	<input type="checkbox"/>
Mr. Year 2	<input type="radio"/>	<input type="checkbox"/>
Miss. Year 6	<input type="radio"/>	<input type="checkbox"/>
Miss. Nursery	<input type="radio"/>	<input type="checkbox"/>
Headteacher	<input type="radio"/>	<input checked="" type="checkbox"/>
Teacher	Owner	Add

Showing 1 to 8 of 8 entries

Previous 1 Next

To add new teachers and pupils, please use the Teachers and Pupils section.

Cancel

Add

Step 7: Check the groups carefully and add/delete any children who may have joined/left the school.

- Go into 'Group Management'.
- Select 'Action' to the right-side of the group.
- Tap 'Edit'.
- View the group list and note any pupils you need to add/remove.

To add a new pupil:

- Go to 'Teachers and Pupils'
- Tap 'Add Pupil'
- Enter their first and last name
- Enter their official UPN.
- Select their class and tap 'Create Pupil'.

To delete a pupil:

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

Step 8: Deleted any unwanted groups from the previous year.

Deleting a group does not remove the children from MarvellousMe. It just deletes the group shell.

- Go to 'Group Management'.
- Select 'Action' to the right-side of the group.
- Tap 'Delete Group' and confirm.

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. Share the passwords with any new staff you added.** Existing staff will keep their login details from last year.
- 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 that you want them to be able 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 (most schools see 90% of parents engaged). Click here for our [tips to get more parents signed up](#).

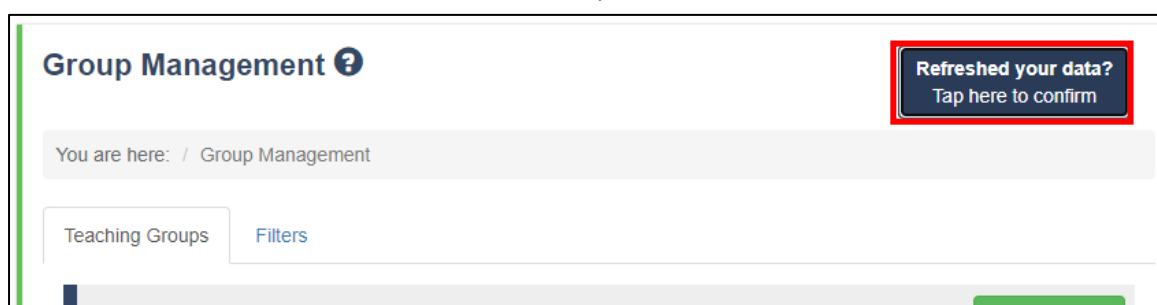
4. Check all staff are set to receive the weekly performance summary email.

- 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 give parents easy access to 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 click on the below button in 'Group Management' 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 😊