



## How to refresh your MarvellousMe data by transitioning classes in 'Group Management'

Updating MarvellousMe for the new school year is easy. This 'transitioning' method is ideal for small to medium-size schools, and where registration classes are not being mixed up, e.g. pupils in Class 1 move into Class 2, and so on. It should take about 15 minutes.

Please see instructions below and/or watch this [YouTube video](#).

### **Important:**

- Only transition your classes when you want the new setup to be active, i.e. ready for the start of the new school year. If you do it before the end of term, it may confuse people.
- It's best to add your new intake (Nursery/Reception) when the children have been added to your MIS, with their correct UPNs. If you create any temporary UPNs, it is important to update them in MarvellousMe as soon as the official ones are available.

### 10 Quick Steps

1. Check and update the staff set up in MarvellousMe (review the 'New Year Data Template' file in 'Data Export' and make any changes in 'Teacher and Pupils').
  - a. Edit any existing staff names and emails.
  - b. Add new starters.
  - c. Remove leavers.
2. Check that all pupils have their correct UPN (review the 'Pupils' file in 'Data Export' and make any changes in 'Teacher and Pupils').
3. Remove Year 6 leavers, leaving an empty shell ('Group Management').
4. Transition pupils to their new class ('Group Management').
5. Add your new Nursery/Reception intake to MarvellousMe ('Group Management').
6. Update group names, the owner, and assign other staff to groups ('Group Management').
7. Check your new groups carefully ('Group Management').
8. Delete any unwanted groups from the previous year. ('Group Management'). NB Deleting a group, does not remove the children from MarvellousMe
9. Add/Remove any other children that have joined/left the school ('Teacher and Pupils').
10. Carry out a few final actions (see the end of this document).

## How to do each step

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

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

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

If any staff name and/or email address needs to be changed, please update it:

- 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) 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 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: Check all pupils have their correct UPN.**

Download and look through the 'Pupils' file in the 'Data Export' section of the Admin system. You should be able to easily identify any made-up/inconsistent UPNs.

If any child was added to MarvellousMe with a false UPN, please ensure you 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.

### **Step 3: Remove leavers in bulk (e.g. Year 6 children)**

- 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'.
- You will then be asked to confirm this action.

- This deletes the children completely from MarvellousMe but leaves the group as an empty shell to transition last year's Year 5 children to.

Group	Year	Pupils	Owner	
Year 6	TBD	15	Miss Year 6	<input checked="" type="checkbox"/> <span>Action ▾</span>

Edit

Transition

Delete group

Empty group and remove children from school

Showing 1 to 8 of 8 entries

#### Step 4: Transition pupils to their new class.

- Go to 'Group Management'.
- Tap 'Action' next to the group of pupils you want to move to the Year 6 class you have just emptied.
- Select 'Transition'.
- You will be asked to select the new class your group is to be transitioned to.
- Tap 'Next'.
- Then confirm the pupils you want to move into the new group.
- Tap 'Transition Group'.
- Repeat the process for the other classes, transitioning each class to the empty class shell created beforehand.
  - Transition last year's Year 4 group into the Year 5 shell, emptying Year 4.
  - Transition last year's Year 3 into the Year 4 shell.
  - Transition last year's Year 2 into the Year 3 shell, and so on.

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 your new Nursery/Reception intake to MarvellousMe.

- Download a report from your MIS (e.g. SIMS) 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.

*Tip: Use our name configurator to format the children's name correctly for MarvellousMe, e.g. to show the first and last name together in one column. You can find this tool in the Admin section of our [SchoolBag](#).*

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

- Go to 'Group Management'.
- Tap 'Action' next to the group you want to add the new intake to.
- 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 searching  
 Add pupils by pasting and matching  
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, the owner, and assign other staff to groups, 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 'Teachers'.
- Tap the 'Owner' circle next to the new owner's name. (If you can't see their name, tap 'Add Teachers' then find them. You'll then need to click the green 'Add' button at the bottom of the box).
- Additional staff (e.g. TAs, SLT) can be assigned to a group using the above steps, however, be sure to click on the 'Add' button next to their name, not 'Owner'.
- 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 new groups carefully.

- Go to 'Group Management'.
- Select 'Action' to the right-side of the group.
- Tap 'Edit'.
- View the group list and make a note of any pupil additions or deletions.

### 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.

### Step 9: Add/delete any other children who may have joined/left the school.

#### 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.

## FINAL ACTIONS

Once you have completed steps 1-7, you are nearly done! There are just 7 important final actions:

1. Copy and paste the below into an email for each new member of staff you have added to MarvellousMe.

*Your MarvellousMe username/email is: (copy and paste staff email address here)*

*Your temporary MarvellousMe password is: (enter the password you created for them here. For security, you may prefer to supply this verbally)*

**Click here to access training documents and tutorial videos:**

[MarvellousMe Teacher System Walkthrough \(PDF\)](#)

[MarvellousMe Teacher System Tutorial Video \(YouTube\)](#)

Further training resources can be found on [www.marvellousme.com/schoolbag](http://www.marvellousme.com/schoolbag)

Existing staff will keep their login details from last year, however they can request a reset password link if they need to, or you can change their password in the 'Teachers and Pupils' section.

**2. Check all non-lead teachers (job shares, SLT, TAs etc.) have been assigned to their respective groups.**

- 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.

Anyone with 'All class' access can message all parents, so please be vigilant with this. 'All class' access is normally a privilege for SLT, SENCO, specialists or the office.

**3. Check then SLT and main class teachers are setup to receive the weekly performance summary email.**

- Go to 'Insights and Impact'.
- Tap 'Weekly Snapshot Recipients'.
- Tick the people who you want to receive the automated performance summary email. To encourage best practice and consistency, we recommend this feature is set up for the SLT and main class teachers.

**4. Check all relevant Quick Links are in place and are up to date.**

- 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 really easy for parents to access:
  - Your school calendar/events page
  - Your school's social media sites
  - Pages hosting home learning schedules and resources, including online portals (TT Rockstars, BBC Bitesize etc)
  - External services (e.g. school meal providers or after school care/clubs)
  - Payment gateways (e.g. Scopay, ParentPay)

**5. Check/Add your 'School Badges' to make parents aware of your school rewards, values and target learning powers, and to reinforce their child's success.**

- Go to 'School Badges'.
- Check any existing badges are still current for the new year.
- Add the new badges you want all the teachers to award, to encourage and praise children.
  - Add the badge name
  - Choose an icon or upload your own custom image.
  - Tap 'Save Badge.'

**6. 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.**

*\*Alternatively, you may wish to print out the parent join code letters for everyone so existing users are reminded to log in, check they have the latest version of the Parent app installed and have device alerts switched on.*

Please remember to print reminder letters using the above steps as often as you can, 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](#).

**7. Please copy and paste the below into an email, complete and then send to [support@marvellousme.com](mailto:support@marvellousme.com).**

I can confirm that the data on our school's MarvellousMe account has been refreshed for academic year 2020/2021, and have:

- Shared the login details and training resources with new members of staff.
- Ensured Weekly Snapshot emails are switched on for relevant staff members,
- Ensured 'School Badges' are in place to make parents aware of our school rewards, values and target learning powers, and to reinforce their child's success.
- Our school have set and communicated 'MarvellousMe non-negotiables' for the staff.

The data refresh was completed by (delete as necessary):

- Transitioning classes in Group Management; or
- Uploading a whole school data file in Bulk Data New Year Update; or
- Completing a whole school data file and sending to MarvellousMe to upload

Main MarvellousMe Contacts for 2020/21\*

- Our Headteacher will be.... (name and email address)
- Our MarvellousMe Champion will be... (name and email address)
- Our MarvellousMe Administrator will be... (name and email address)

*\*required as part of our GDPR responsibilities. This will mean we can send training resources and future updates/Health Checks to the relevant people and, if necessary, reset the login details for your Admin account.*