



## 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/SEEMiS references for the new intake yet? You can transition all other classes, then add the new pupils at a later date.**

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.mme@junipereducation.org](mailto:support.mme@junipereducation.org).

## Step-by-Step Instructions: Transition Method

### Step 1: Check and update the staff in the MarvellousMe Admin portal.

- Go into the **Data Export** section, download and review the **New Year Data Template** file. Check the details for the existing staff are correct – has anyone's name or email address changed? Who needs to be deleted? Etc.
- Make necessary changes in the **Teachers and Pupils** section. Access our Help Centre articles explaining how to:
  - [Edit or delete a teacher's account](#)
  - [Add a new teacher](#)

### Step 2: Check and update the pupils set up in MarvellousMe.

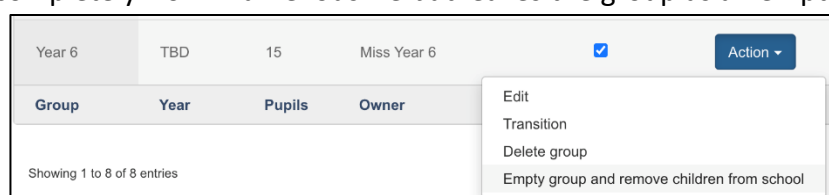
**IMPORTANT Identify anyone set up using a fake/temporary UPN (or SEEMiS reference) and update them.**

If fake UPNs are not corrected, these children could 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, 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.
- Access our Help Centre articles explaining how to
  - [Edit a pupil's account](#)

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

- Go to **Group Management** and 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.



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

Showing 1 to 8 of 8 entries

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

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

**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.
- Go to **Group Management** and select **Action** to the right side of the group you want to transition (e.g. Year 5) into the empty shell.
- Select **Transition** - Be careful to select **Transition** (not 'Delete Group' or 'Empty group and remove children from the school').
- 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.

The screenshot displays a table of school groups with columns for Group, Year, Pupils, and Owner. An 'Action' dropdown menu is open for the Year 5 group, showing options: Edit, Transition, Delete group, and Empty group and remove children from school. Below the table, a 'Transition group: Year 5' dialog is shown. It prompts the user to 'Select the new group that you want to transition this group to.' and lists options: Nursey, Reception, Year 1, Year 2, Year 3, Year 4, and Year 6. The 'Year 6' option is selected. A 'Next' button is visible. Below this, another 'Transition group: Year 5' dialog prompts the user to 'Confirm the pupils that you want to move into the new group.' It features a 'Select/Deselect All' button and a list of pupils: Molly, Jo, Kate, Miller, Molly, Jo, and Kya. A 'Transition Group' button is visible at the bottom.

Group	Year	Pupils	Owner
Year 5	TBD	27	Mrs Smith
Year 6	TBD	15	Miss Year 6

Showing 1 to 8 of 8 entries

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: Do you have UPNs/SEEMiS references through for your new intake (e.g. Nursery or Reception)?

- **No** – Please move to Step 6. The new cohort can be quickly added later, when you have their UPN/SEEMiS references.
- **Yes** – Please see instructions below
  - Run a report for the new cohort from your MIS (e.g. SIMS, Arbor, SEEMiS) and export it into Excel as follows:
    - Column A = First and last names of the pupils\*.
    - Column B = Their UPN/SEEMiS reference.
    - Column C = Their Reg Group.
    - Keep this file open as you will need to use this shortly.

\*If your MIS reports the pupil's names in a different format, please use our [Name Configurator](#) to reformat them correctly for MarvellousMe.

- Go to **Group Management** and select **Action** next to the group for the new intake to (e.g. Nursery, Reception).
- Select **Edit**, then select **Add Pupils**.
- Select **Add pupils by pasting a .csv list**.
- Go back to your Excel file, highlight and copy columns A and B only (i.e. the children's names and UPNs/SEEMiS reference).

	A	B	C
1	CHILD NAME	UPN	REG GROUP
2	Michelle Topman	FAKEUPN023	Nursery
3	Benjamin Griffith	FAKEUPN033	Nursery
4	Catherine Wright	FAKEUPN025	Nursery
5	Melanie Dawson	FAKEUPN027	Nursery
6	Ava Wiseman	FAKEUPN029	Nursery
7	Pippa Rickett	FAKEUPN020	Nursery
8	Noah	FAKEUPN032	Nursery
9	Milli Jacobs	FAKEUPN024	Nursery
10	Mia Mia	FAKEUPN034	Nursery
11	Suzaane Ward	FAKEUPN026	Nursery
12	Kate Hall	FAKEUPN028	Nursery
13	Emily Hare	FAKEUPN030	Nursery

- Go back into **Group Management** and paste the data into the empty box.
- Select **Next** then check the pupil list and tap **Create and Add pupils**.

The screenshot shows the 'Group Management' interface for the 'Nursery' group. The 'Actions' menu is open, and 'Add Pupils' is selected. A modal window titled 'Create and add Pupils to Nursery' is displayed, providing instructions on how to add pupils from a school's main administration system (e.g. SIMS). It includes a list of pupils with their names and UPNs, and a 'Next' button.

Below the instructions, a list of pupils to be added is shown:

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

The 'Next' button is highlighted in green.

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

To edit a group name (e.g. Reception to Squirrels, 2RP to 2MB)

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

The screenshot shows the 'Group Members' interface. At the top, there are navigation links for 'Group Management' and 'Group Members'. Below that, there are input fields for 'Group Name' (containing 'Year 4') and 'Group Year' (containing 'TBD'). A green 'Save Changes' button is visible. Below the input fields, there are tabs for 'Pupils' and 'Teachers'. The 'Teachers' tab is active, showing a table with columns for 'Teacher', 'Owner', 'Edit', and 'Remove'. The table contains one entry for 'Mrs. Year 4' with a blue circle next to the name, a green 'Edit' button, and a yellow 'Remove' button. At the bottom, there are pagination controls showing 'Showing 1 to 1 of 1 entries' and 'Previous 1 Next'.

The screenshot shows the 'Add Teachers' interface. At the top, there is a green header with the text 'Add Teachers' and a close button. Below that, there is a search bar and a 'Select/Deselect All' checkbox. The main area contains a table with columns for 'Teacher', 'Owner', and 'Add'. The table lists several teachers: 'School Office', 'Mrs. Year 5', 'Mrs. Year 4', 'Mrs. Reception', 'Mr. Year 2', 'Miss. Year 6', 'Miss. Nursery', and 'Headteacher'. Each row has a radio button in the 'Owner' column and a checkbox in the 'Add' column. The 'Headteacher' row has a blue checkmark in the 'Add' column. At the bottom, there are pagination controls showing 'Showing 1 to 8 of 8 entries' and 'Previous 1 Next'.

## Step 7: Delete pupils that have left the school (and not in Year 6).

- Access our Help Centre article explaining how to [delete a pupil](#).

## Step 8: Add any other new pupils (and not in the new intake groups).

- Access our Help Centre article explaining how to [add a pupil](#).

## Step 9: Deleted any unwanted groups from the previous year (e.g. sports groups, intervention groups).

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.
- Select **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](#).

- **Share the passwords with any new staff you added.** Existing staff will keep their login details from last year.
  - **Check all staff have been assigned to their respective groups (including job shares, school leaders, TAs etc.)**
  - Access our Help Centre article explaining how to [assign staff to different groups](#).
- 3. Print the parent join code letters for all parents who have not joined up to MarvellousMe, including the new starters.**
- Access our Help Centre article explaining how to [print parent join code letters](#) for each class.
  - 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.**
  - We recommend that you flag a date in your diary to reprint reminder letters using the above steps for those slow to join. 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**.
  - Select **Weekly Snapshot Recipients**.
  - Select 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. Update/Add your Quick Links.**

- Click [here](#) to see how to edit or delete Quick Links
- Click [here](#) to see how to add new Quick Links.

**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 😊**