


## Stage 8: Create Y4 Transfers Files

To be undertaken by the Integris Administrator

Stage 8 contains the following **two** main steps:

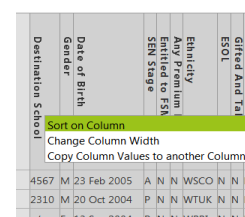
1. Check status of markbook and note the destination middle schools
2. Create the transfer files

### 1. Check the status of the markbook:

1. Go to **Assessment > Markbooks >** select the **Y4 Data\_Transfers 2022** markbook assigned to your **Year 4** pupils to highlight it in bold > click the **Open Markbook**  icon
2. Check the **Y4 Data\_Transfers 2022** markbook is complete in terms of the Y4 TA data required for transfer to destination schools.
3. Check and note the destination schools in the **Destination School** column

Tip! - Sort the Destinations schools column to group the different destination schools together by **left clicking** the column heading for destination school and click on **Sort on Column**.

This action will group together all the destination schools in ascending order. Repeat it to sort the schools in descending order.



Destination School	Gender	Date of Birth	SEN Stage	Ethnicity	Any Premium Entitled to FSM	Transfer to Other School	Transfer to Other School
4567	M	23 Feb 2005	A	N	N	WSCO	N
2310	M	20 Oct 2004	P	N	N	WTUK	N
n/s	F	13 Sep 2004	P	N	N	WBRI	N

Hover over each of the different DfE numbers and **note down the different destination school names and their DfE numbers, also making a note of the number of pupils that have the same destination school.**

[Note: the number of different DfE numbers you list represents the number of transfer files you need to create in a later step].

### Now filter pupils for one destination school

4. Click **Apply Filter > Apply Filter** (at top left of markbook) to see following window:



Markbook Item:

Criteria:

Value:

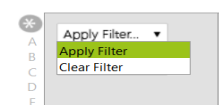
Destination School

is equal to

END

OK

Cancel



5. Now **set the filter** appropriately:
  - > Select **Destination School** from the **Markbook Item** pull-down list
  - > Select **is equal to** from the **Criteria** pull-down list
  - > In the **Value** box, **type in one** of your destination DfE numbers > click **OK**

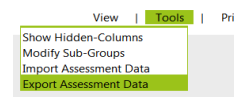
After a few seconds, the markbook will only contain the pupils who have been assigned to the destination school you entered into the filter window.

You are now ready to create a transfer file for this destination school. Follow steps below.

### 2. Create Y4 Transfers files for destination schools

1. Take a few minutes to check that all the pupils are present in the markbook for the destination school selected.

2. To create the Y4 Transfer file for this filtered destination school, go to the **Tools** menu (top right of the markbook screen) and select **Export Assessment Data**

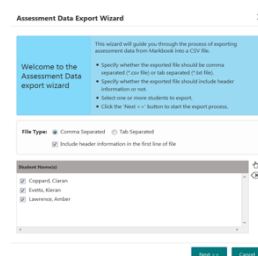


*Note: Any changes made to the markbook not yet saved will prompt a click **Save** before proceeding.*

*At the **Assessment Data Export Wizard** screen, only the Year 4 pupils assigned to the filtered destination school should be selected in the list.*

3. Click **Next**

*In the next window, pupil names and the data columns included in the transfer file are confirmed = your last check to make sure it is correct!*

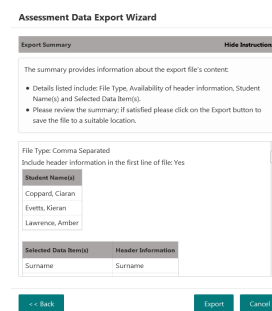


4. Click **Next**

*The final screen displays a summary of what was selected for the transfer file.*

5. Click **Export**

6. In the next window, select **Open** with Microsoft Office **Excel**.  
Your Year 4 pupils and all the TA levels along with the contextual items will be listed.



*This is your final opportunity to check that the data is all present and correct and the additional contextual items selected appear at the beginning of the spreadsheet.*

7. Within **Excel**, click on **File > Save As...**  
 > **select an appropriate folder to save your Y4 Transfers file in** (or create a new folder called **Y4 Transfers 2022** to save this file and subsequent files in)  
 > ensure that **Save As Type** displays **CSV (Comma Delimited)**  
 > enter filename as **<yourschoolname> Y4 Transfers 2022 to <destination schoolname>** (eg; MyLowerSchool Y4 Transfers 2022 to Faraway School)

*> answer Yes to any saving and formatting prompts and close the file.*

8. Back in the **Y4 Data\_Transfers 2022** markbook, you now need to filter the next destination school and repeat the above steps **from step 1.4 above** for each of the remaining destination schools on your list.
9. When you have created a transfer file for each destination school, click **Back** to exit out of the markbook, saving any changes.

*You are now ready to send the transfer files to your destination schools: **see below**.*

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### Send Transfers files to CBC destination schools:

#### ➤ Via Anycomms to other schools in Central Beds

- > login to Anycomms and from the home menu select Send to an Organisation
- > upload each transfer file (as previously named from the folder you saved them in (eg: *MyLowerSchool Y4 Transfers 2022 to Faraway School* etc. – *there is no need to change the names of these transfer files*) >and select the appropriate destination school **within CBC** to send to.

### Sending to schools in another authority

#### ➤ Via S2S to schools in other authorities

- > please **zip the transfer file and rename** the zip file as follows: **823dddd\_LLLaaaa\_Y4Transfers.zip** (where dddd=your DfE number; LLL= LA number and aaaa=destination school's DfE number).
- > Then logon to DfE Sign-in gateway and select the **S2S** web site
- > From the side menu, click on + next to Upload
- > Select **Upload Generic File**
- > Click Browse and locate the zipped transfer file (named as above)
- > Click Upload File

When the file has been sent, repeat as above for the next file or Logout.

Please contact the destination schools to let them know that you have sent a transfer file.