Integrated National Education Information System (iNEIS™)

Activity for Manage Student Clearance

Table of Contents

Introduction 1
1. Create Clearance Checklist 2
1.1 *Batch* 2
1.1.1 *Custom option* 2
1.1.2 *External File option* 4
1.1.3 *PS Query option* 6
1.2 *Individually* 8
2. Update status of Clearance Checklist Items 9

Introduction

This document contains step-by-step instructions to create Clearance Checklist for students who are eligible to go through clearance. The Clearance Checklist will be created for the following students:

1. Transfer Students
2. Withdrawal Students
3. Graduation Students

Note:
For Transferred and Withdrawn students, the Clearance Checklist will be created when the approved request form is ‘Completed’ by School Student Registrar.

The activities needed to be done are as follows:

1. Create Clearance Checklist
2. Update status of Clearance Checklist Items

1. Create Clearance Checklist

This function allow the user who have the School Admin – Clearance role to create Clearance Checklist for students who are eligible to go through clearance.

> **Note:**
> This step is not applicable for **Pre-School** students because there are no Clearance Checklist Items for Pre-School career.

There are 2 options of creating the Clearance Checklist for the Students:

1. ***Batch***
   This option is only applicable for students who have completed their Academic Program and ready for 'Graduation'.
2. ***Individually***
   This option is applicable for students who have completed their Academic Program, transferring-out and withdrawn students.

1.1 *Batch*

> **Note:**
> There are 3 options to create Clearance Checklist in batch*:*
> 1. **Custom option**
>   *This option is for user to manually enter the students one by one.*
> 2. **External File option**
>   *This option is for user to create an Excel file to upload the students.*
> 3. **PS Query option**
>   *This option is for user to create for a group of students by their Academic Program & Academic Plan. For example, create Clearance Checklist for students from Year 10 Express.*

1.1.1 Custom option

Roles Involved: **School Admin – Student Clearance**

1. Navigate to **Main Menu > Records and Enrollment > Student Movement > Clearance > Assign Clearance Checklist**.
2. To run the process to create Clearance Checklists for students, click on **Add a New Value** tab.
3. Enter a **Run Control ID** *(A unique identifier that you will need for future reference)*
   For e.g. 1006_2016_PSRYR6 (Format are as follows: SCHOOL CODE_YEAR_ACADEMIC PROGRAM)
4. Click on the **Add** button.
5. User will be directed to **Create Clearance Checklist** page.
6. Click on the **Campus** lookup to search for the campus.
7. Click on the **Selection Criteria** dropdown box and select '**Custom**' from the list.

Note:
Using the Selection Criteria, the user who have School Admin – Clearance role will decide which method to use to select the students for clearance:

1. **Custom** – This will allow user to enter the student individually.
2. **Population Selection** – This will allow user to process students in batch using either an External File to or PS Query.

8. Click on the ***Student ID** lookup icon in the Custom Population section.
9. Click on the '**+**' icon to add more students.
10. Click on the ***Student ID** look-up button to add the student in the newly added row.
11. Click on the '**-**' icon to delete a student from the Custom Population List.
12. Click on the **Save** button and the click on the **Run** button to run the process.
13. User will be directed to Process Scheduler Request page.
14. Select the process, '**Create Clearance Checklists**' from the process list.
15. Click on '**OK**' button.
16. Once the process has begun to run, a **Process Instance** number will be assigned.
17. Click on the **Process Monitor** link to check the status of the process run.
18. User will be directed to the Process Monitor page.
19. Monitor the process against the Process Instance number and initially the **Run Status** and **Distribution Status** are '**Queued**' and '**N/A**'.
20. Click on the **Refresh** button to view the refreshed Run Status. Click on the Refresh button until Run Status changes to '**Success**' and Distribution Status goes to '**Posted'.**
21. Once the Run Status goes to '**Success**' and Distribution Status goes to '**Posted**', click on the **Details** link.
22. User will be directed to **Process Detail** page, click on the **View Log/Trace** link in the Actions section.
23. User will be directed to **View Log/Trace** page, click on the '**MOE_CHKLT_AE_(Instance No.).log**' link.

Note:
Once the Clearance Checklists are successfully created for the selected students, the Teachers/Persons In-charge of Clearance Checklist items will receive an email notification.

24. The **Process Log** will indicate the list of students for who the Clearance Checklists were successfully created and the students for who it wasn't created and the reason.

1.1.2 External File option

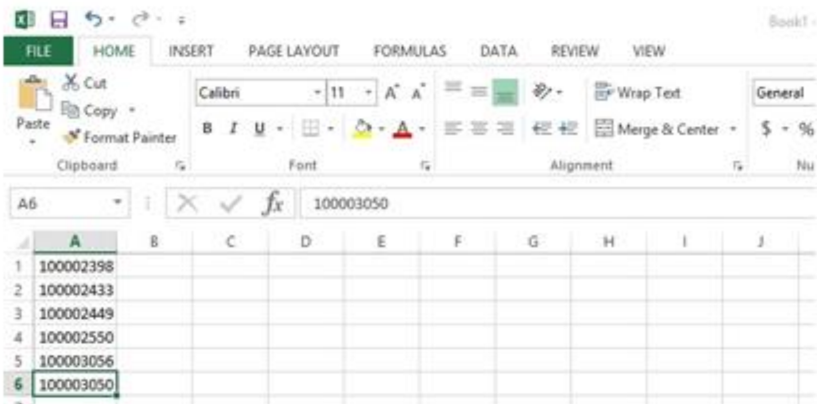
Roles Involved: **School Admin – Student Clearance**

1. Navigate to **Main Menu > Records and Enrollment > Student Movement > Clearance > Assign Clearance Checklist**.
2. To run the process to create Clearance Checklists for students, click on **Add a New Value** tab
3. Enter a **Run Control ID**. *(A unique identifier that you will need for future reference)*

   For e.g. 1006_2016_PSRYR6 (Format are as follows: SCHOOL CODE_YEAR_ACADEMIC PROGRAM)
4. Click on **Add** button.
5. User will be directed to **Create Clearance Checklist** page.
6. Click on the **Campus** lookup to search for the campus.
7. Click on the **Selection Criteria** dropdown box and select '**Population Selection**' from the list. The **Population Selection** group box will appear.

> **Note:**
> Using the Selection Criteria, the user who have School Admin – Clearance role will decide which method to use to select the students for clearance:
> 1. **Custom** – This will allow user to enter the student individually.
> 2. **Population Selection** – This will allow user to process students in batch using either an External File to or PS Query

8. In the **Population Selection** section, click on the **Selection** Tool dropdown.
9. Select the option '**External File**' from the list.

> **Note**:
> This to create an Excel file (.csv format) with only the Student IDs.
>
> **Steps to create a .csv file:**
> 1. Open the Microsoft Excel.
> 2. Enter the **Student IDs** as shown below.
>
> 
>
>
> 3. Click on Save As.
> 4. Enter the File Name and select **'CSV (Comma delimited)'** as the Save as type.
> 5. Click on Save.

10. Click on the **Upload File** button to attach the **csv file**.
11. Click on the **Choose File** button to select the document.
12. Select the **csv file** and click on **Open** button.
13. Click on **Upload** button to upload the selected document or click on the **Cancel** button to cancel the upload.
14. Upon clicking OK and the csv file is successfully uploaded, the **Delete File** button and **View File** button are enabled. The **Delete File** button is used to delete the list of students (csv file) and **View File** button is used to view the attached list of students (csv file).
15. Click on the **File Mapping** lookup icon and select '**UPLOAD_CL_STUDENTS**'. This File Mapping needs to be selected by the user, as it helps the system to link the values in the External File as input for the process.
16. Once the File Mapping is selected, the user is able to verify that the values in the External File are identified correctly. Click on the **Preview Selection** Results link for the verification.
17. User will be directed to the Preview Selection Results page.
18. Click on the **Return** button to return to the process parameters page.
19. Once the verification is completed, the values need to be populated into the Custom Population List. Click on **Load Selection Results** to Populate the Student List.
20. The Student IDs uploaded using the External file will be populated into the Custom Population List.
21. After the Student IDs are populated into Custom Population List section, the user is able to **update** the list by adding or deleting Student IDs. Click on '**+**' icon to add more Student IDs or '**-**' icon to delete the added Student IDs.
22. Click on the **Save** button and then click on the **Run** button to run the process.
23. User will be directed to Process Scheduler Request page.
24. Select the process, '**Create Clearance Checklists**' from the process list.
25. Click on '**OK**' button.
26. Once the process has begun to run, a **Process Instance** number will be assigned.
27. Click on the **Process Monitor** link to check the status of the process run.
28. User will be directed to the Process Monitor page.
29. Monitor the process against the Process Instance number and initially the Run Status and Distribution Status are 'Queued' and 'N/A'.
30. Click on the **Refresh** button to view the refreshed Run Status. Click on the Refresh button until Run Status changes to '**Success**' and **Distribution Status** goes to '**Posted**'.
31. Once the **Run Status** goes to '**Success**' and **Distribution Status** goes to '**Posted**', click on the **Details** link.
32. User will be directed to **Process Detail** page, click on the **View Log/Trace** link in the Actions section.
33. User will be directed to **View Log/Trace** page, click on the '**MOE_CHKLT_AE_(Instance No.).log**' link.

Note: Once the Clearance Checklists are successfully created for the selected students, the Teachers/Persons In-charge of Clearance Checklist items will receive an email notification.

34. The **Process Log** will indicate the lists of student for who the Clearance Checklists were successfully created and the students for who it wasn't created and the reason.

1.1.3 PS Query option

Roles Involved: **School Admin – Student Clearance**

1. Navigate to **Main Menu > Records and Enrollment > Student Movement > Clearance > Assign Clearance Checklist**.
2. To run the process to create Clearance Checklists for students, click on **Add a New Value** tab
3. Enter a **Run Control ID**. *(A unique identifier that you will need for future reference)*

   For e.g.1006_2016_PSRYR6 (Format are as follows: SCHOOL CODE_YEAR_ACADEMIC PROGRAM)
4. Click on **Add** button.
5. User will be directed to Create Clearance Checklist page.
6. Click on the **Campus** lookup to search for the campus.
7. Click on the **Selection Criteria** dropdown box and select '**Population Selection**' from the list. The **Population Selection** group box will appear.

Note: Using the Selection Criteria, the user who have School Admin – Clearance role will decide which method to use to select the students for clearance: 1. **Custom** – This will allow user to enter the student <u>individually</u>. 2. **Population Selection** – This will allow user to process students in <u>batch</u> using either an External File to or PS Query

8. In the **Population Selection** section, click on the **Selection** Tool dropdown.
9. Select the option '**PS Query**' from the list.

Note: When the **PS Query** option is selected, a specific query needs to be selected to fetch the Student IDs required to run the process.

10. Click on the **Query Name** lookup icon and select '**MOE_CL_CHK_QRY**'.
11. Click on the **Edit Prompt** link to enter the report input values.
12. In the Query Prompt box, click on the **Institution** lookup icon and select '**MOE01**'.
13. In the Query Prompt box, click on the **Academic Career** lookup icon and select the career the School Admin - Student Clearance has access to.
14. In the Query Prompt box, click on the **Academic Program** lookup icon and select appropriate Academic Program.

15. In the Query Prompt box, click on the **Academic Plan** lookup icon and select the appropriate Academic Plan.
16. Click on '**OK**' button.
17. Click on the **Preview Selection Results** link to view all the students selected according to the criteria mentioned in the Query Prompt.
18. User will be directed to the Preview Selection Results page.
19. Click on the **Return** button to return back to the process parameter page.
20. Click on the **Load Selection Results** link to populate the students into the Custom Population List section.
21. The Student IDs selected by the PS Query will be populated into the Custom Population List.
22. After the Student IDs are populated into the Custom Population List section, the School Admin - Student Clearance is able to **update** the list by adding or deleting Student IDs. Click on '**+**' icon to add more Student IDs or '**-**' icon to delete the added Student IDs.
23. Click on the **Save** button and then click on the **Run** button to run the process.
24. User will be directed to Process Scheduler Request page.
25. Select the process, '**Create Clearance Checklists**' from the process list.
26. Click on '**OK**' button.
27. Once the process has begun to run, a **Process Instance** number will be assigned.
28. Click on the **Process Monitor** link to check the status of the process run.
29. User will be directed to the Process Monitor page.
30. Monitor the process against the Process Instance number and initially the Run Status and Distribution Status are 'Queued' and 'N/A'.
31. Click on the **Refresh** button to view the refreshed Run Status. Click on the Refresh button until Run Status changes to '**Success**' and Distribution Status goes to '**Posted**'.
32. Once the Run Status goes to '**Success**' and **Distribution Status** goes to '**Posted**', click on the **Details** link.
33. User will be directed to **Process Detail** page, click on the **View Log/Trace** link in the Actions section.
34. User will be directed to **View Log/Trace** page, click on the '**MOE_CHKLT_AE_(Instance No.).log**' link.

Note:
Once the Clearance Checklists are successfully created for the selected students, the Teachers/Persons In-charge of Clearance Checklist items will receive an email notification.

35. The **Process Log** will indicate the lists of student for who the Clearance Checklist was successfully created and the students for who it wasn't created and the reason.

1.2 *Individually*

Role Involved: **School Admin – Student Clearance**

1. Navigate to **Main Menu > Campus Community > Checklists > Person Checklists > Checklist Management – Person**.
2. To create a new Clearance Checklist, click on the **Add a New Value** tab.
3. Click on the lookup icon to search for the **Student ID**.
4. Click on the **Add** button.
5. User will be directed to the Checklist Management - Person page.
6. Search for 'GEN' – General on the lookup icon of the ***Administration Function**.
7. Click on the lookup icon to search for the ***Checklist Code**.

Note:

List of Checklist Code for Primary School:

- 'CPRICL' (Completion – Primary)
- 'TPRICL' (Transfer Student – Primary)
- 'WPRICL' (Withdrawal Student – Primary)

List of Checklist Code for Secondary School:

- 'CSECCL' (Completion – Secondary)
- 'TSECCL' (Transfer Student – Secondary)
- 'WSECCL' (Withdrawal Student – Secondary)

List of Checklist Code for Sixth Form School:

- 'CSXFCL' (Completion – 6^{th} Form)
- 'TSXFCL' (Transfer Student – 6^{th} Form)
- 'WSXFCL' (Withdrawal Student – 6^{th} Form)

List of Checklist Code for Sports School:

- 'CSSCL' (Completion – Sports School)
- 'TSSCL' (Transfer Student – Sports School)
- 'WSSCL' (Withdrawal Student – Sports School)

8. Select 'Initiated' from the ***Status** drop-down list.
9. Click on the **Save** button.

2. Update status of Clearance Checklist Items

This function allows the user who have School Admin – Clearance role to update the status of the clearance checklist items of an individual student.

Role Involved: **School Admin – Student Clearance**

1. Navigate to **Main Menu > Campus Community > Checklists > Person Checklist > Checklist Management – Person**.
2. Click on the **Find an Existing Value** tab.
3. Click on the **ID** lookup icon and search for the student who as a Clearance Checklist created for him/her.
4. Click on the **Search** button.
5. User will be directed to the **Checklist Management – Person** page.
6. Click on the **Checklist Management 1** tab.

> **Note**:
> The Clearance Checklist created will display the **Date/Time** it was created as well as the **Checklist Code**.
>
> When the Clearance Checklist is created for Transferred and Withdrawn students, the **Comments** field will contain the Request Nbr of the Completed Request form.

7. Click on the **Checklist Management 2** tab.
8. User will see each of the **Clearance Items** listed in this page which the student is supposed to complete.
9. Select one of the statuses from the dropdown list of the items the School Admin or teachers/persons in-charge of and update the status of the item.

> **Note:**
> There are 4 statuses available:
> 1. **Initiated:** The default status of all items; No action has been taken to clear this item since Clearance Checklist has been created.
> 2. **Not Applicable**: The item is irrelevant to the student.
> 3. **Work in Progress:** Action has been taken to clear the item but not yet completed.
> 4. **Completed:** Student has returned the item or has completed the task.

10. Click on the **Save** button once user has done updating the statuses of the Clearance Items.