

ASHOKA EDUCATION FOUNDATION'S

# ASHOKA BUSINESS SCHOOL

**Additional Information for  
6.2.3 - Implementation of e-governance in areas of operation  
For AQAR 2022-23**

# ACADEMIA

Release Notes – UI/UX

**Build Name: Kalam (Regression)**

## Serosoft Solutions Pvt Ltd

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[www.academiaerp.com](http://www.academiaerp.com)

## Version

| Date Changed | Descriptions of Change(s) | Responsible Person |
|--------------|---------------------------|--------------------|
| 03/08/2023   | Initial Draft             | Harshal Kamle      |

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## Overview

### Introduction

Serosoft Solutions is glad to announce the release of the latest version of our flagship product Academia V2. The new release is coined as **Kalam**. This document is intended to share information and only information about the UI/UX-related modifications introduced with the application's new release.

### About Release

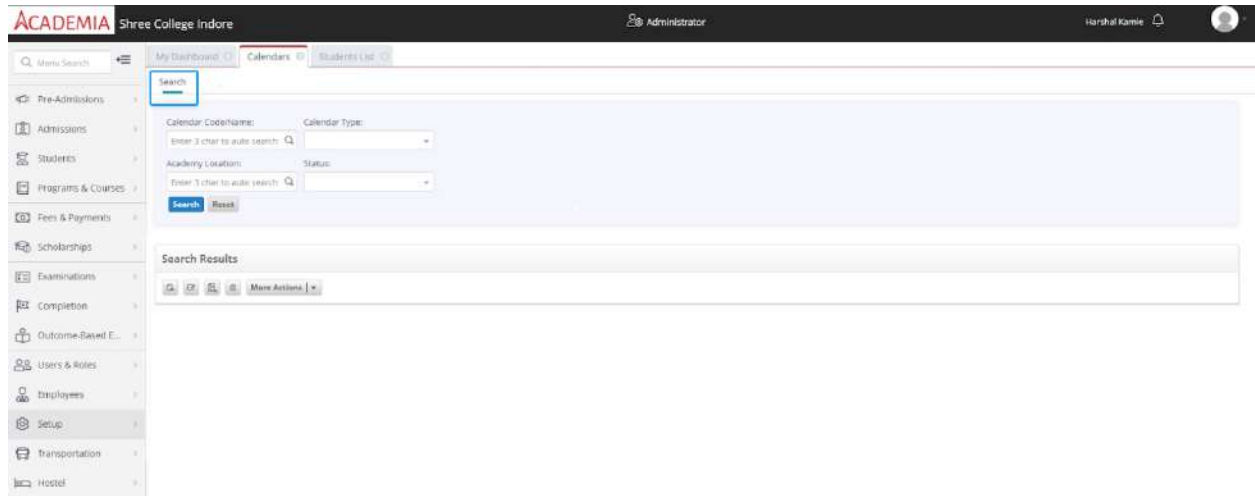
**Kalam** is a major release for all the clients for the modified UI/UX of Academia with Serosoft.

## UI/UX changes

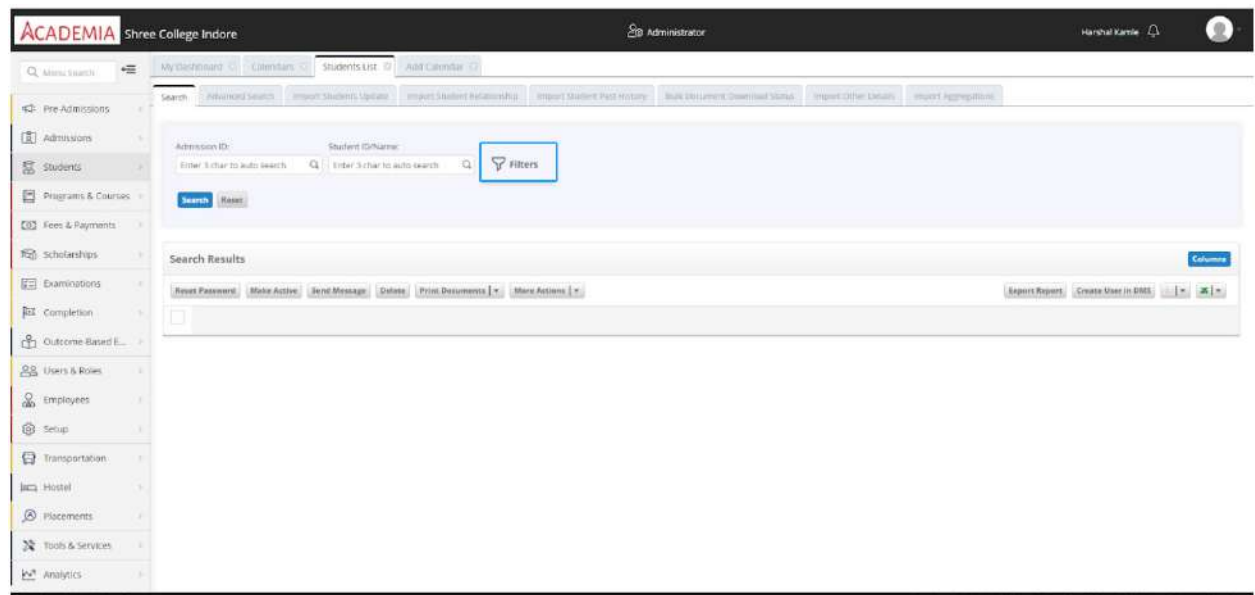
# Core ERP

1. Rename the “Search” subtab heading to “Calendar” on the Calendar screen. In order to maintain the consistency of design throughout the Admin portal

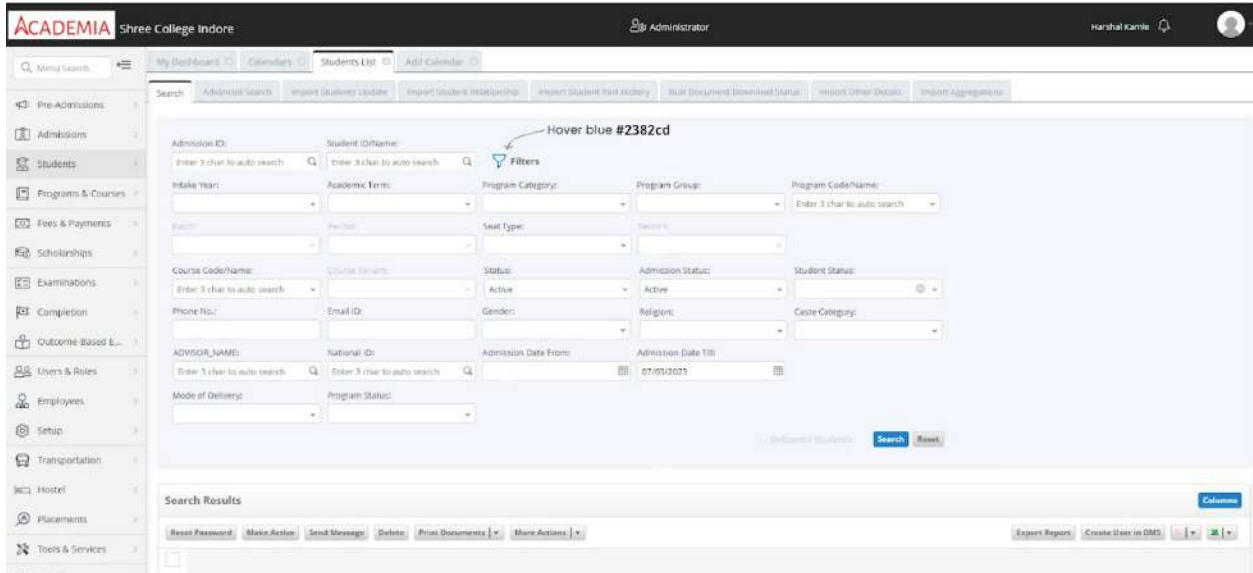
Path: Core ERP > Setup > Calendar



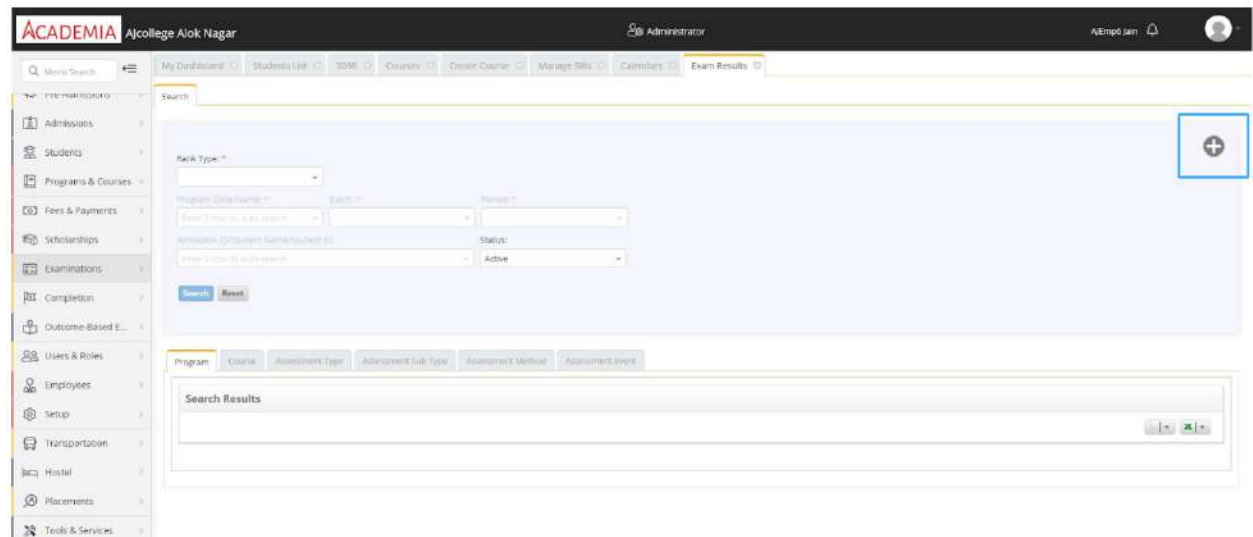
2. More filter Accordion plus icon(Collapsible) replaced with “funnel” icon on all the portals



On hover to funnel icon its color change black to blue



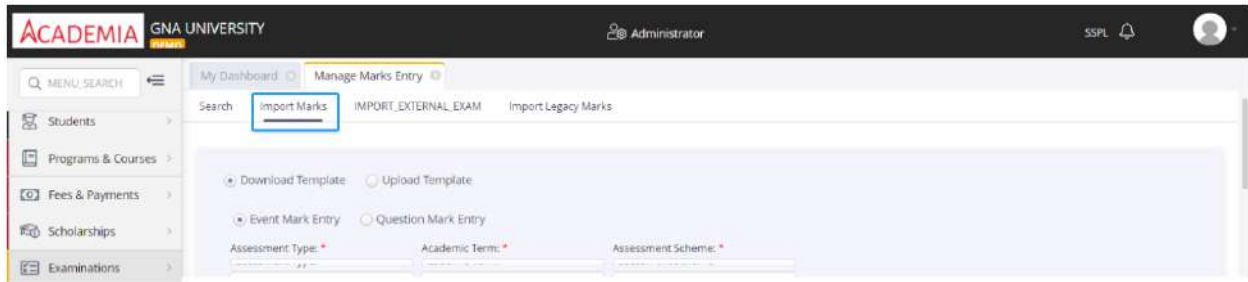
### 3. Remove plus/accordion icon on the right top corner



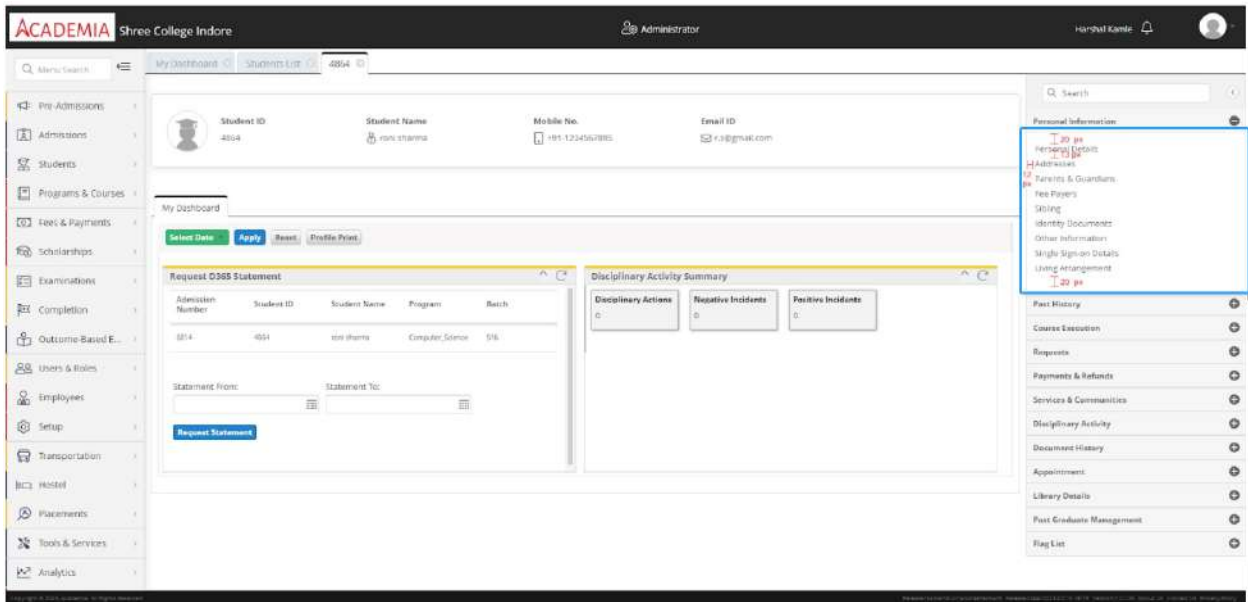




**6. New design for sub tabs are introduced where the selected tab should be highlighted with blue underline**

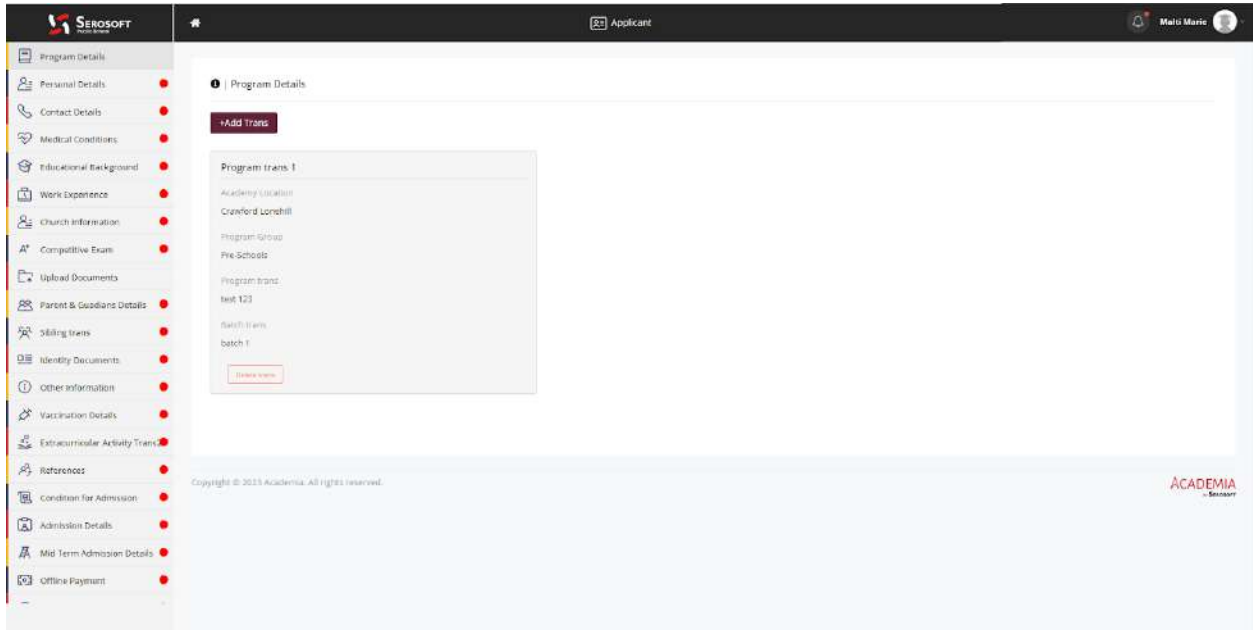


**7. Right Grid Alignment (proper alignment of the links in the student profile)**

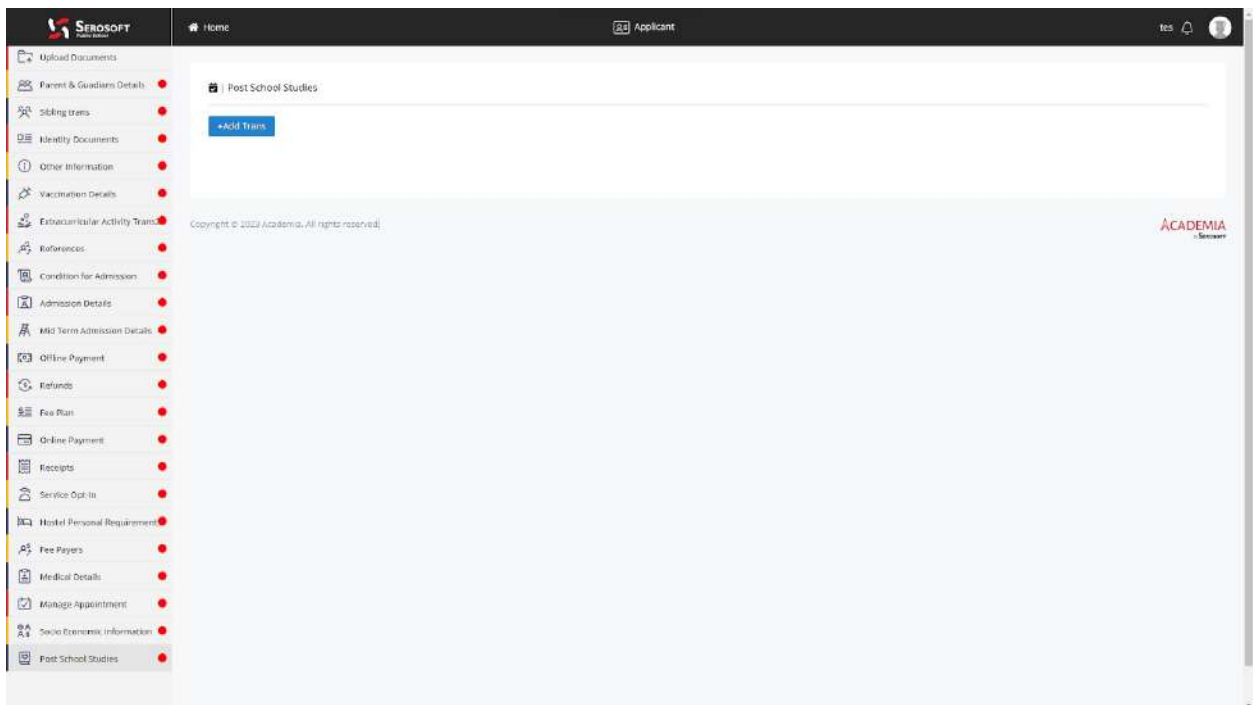


# Applicant Portal (Angular)

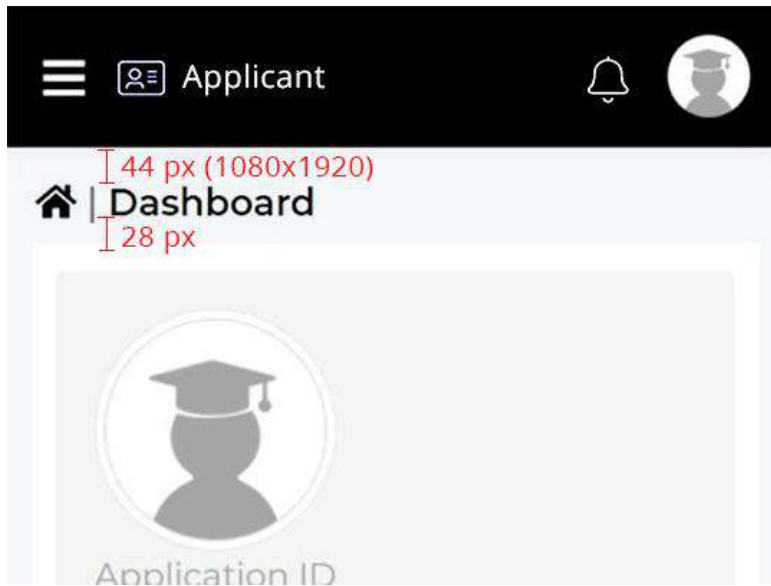
## 1. Fix alignment of notification icon(Angular)



## 2. Buttons should be in Blue color for angular Applicant portal

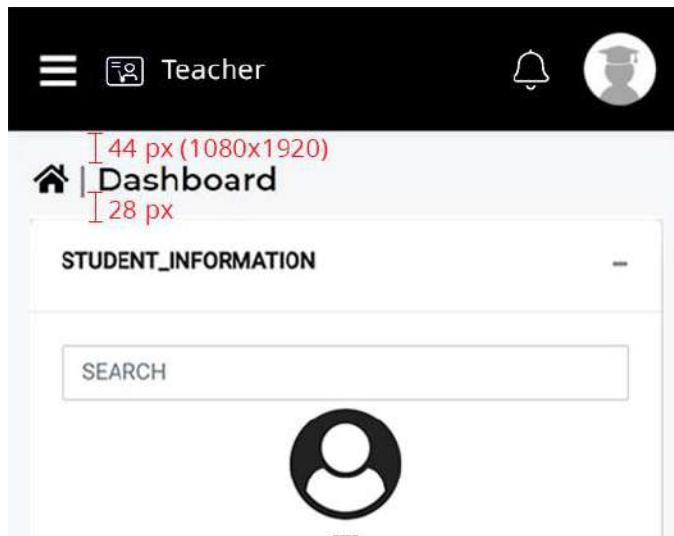


### 3. UI Design updated for menu Responsive Header similar to core ERP

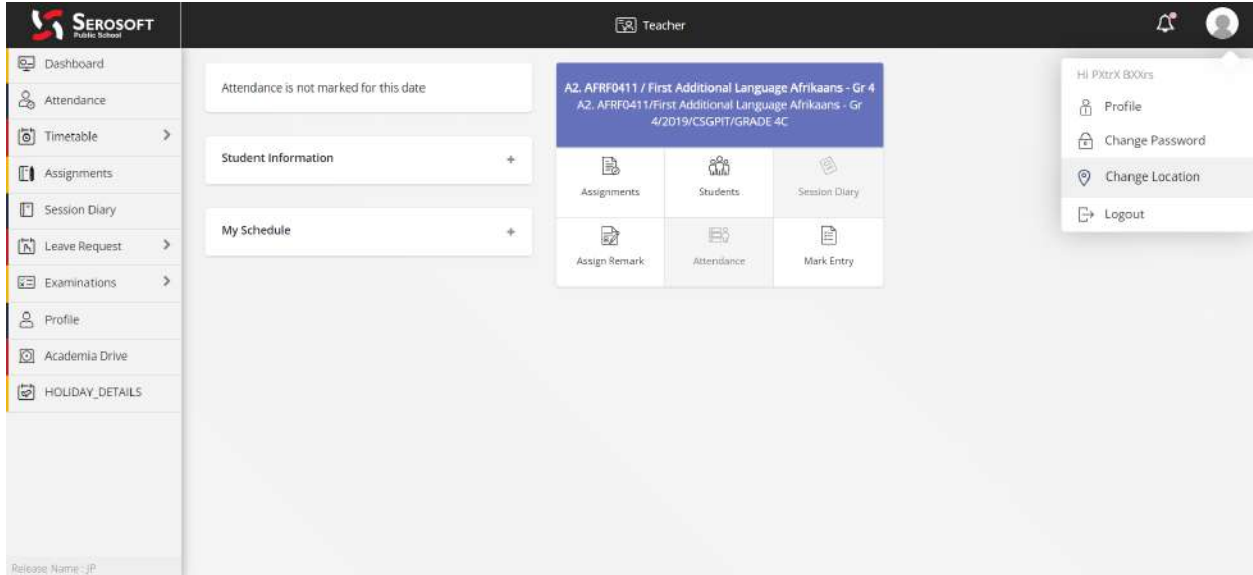


## Faculty Portal (Angular)

### 1. UI Design updated for menu Header similar to core ERP

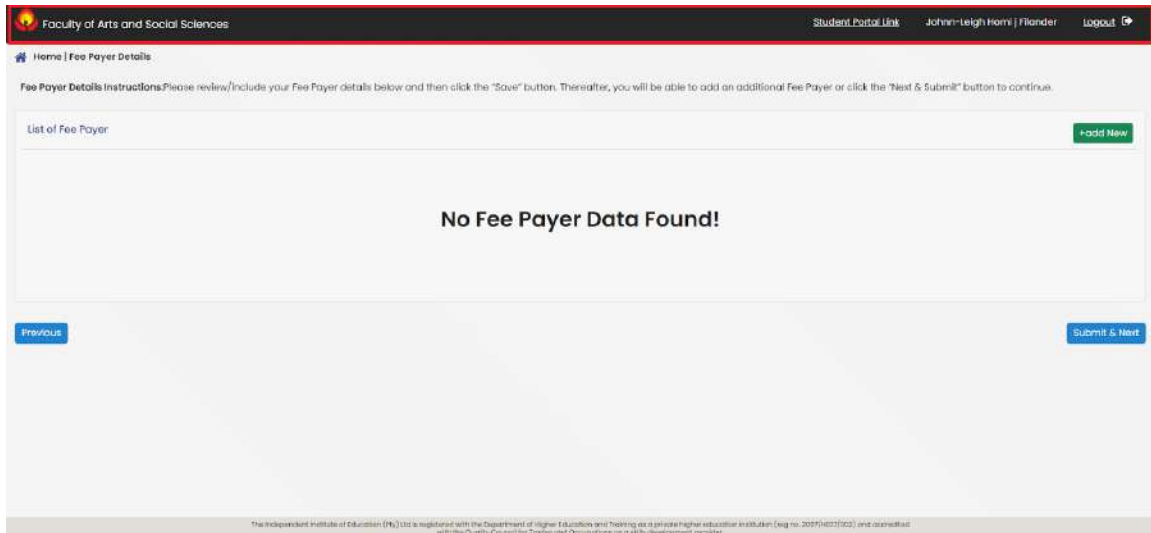


### 2. "Change Location" Option placement change to right above the logout option

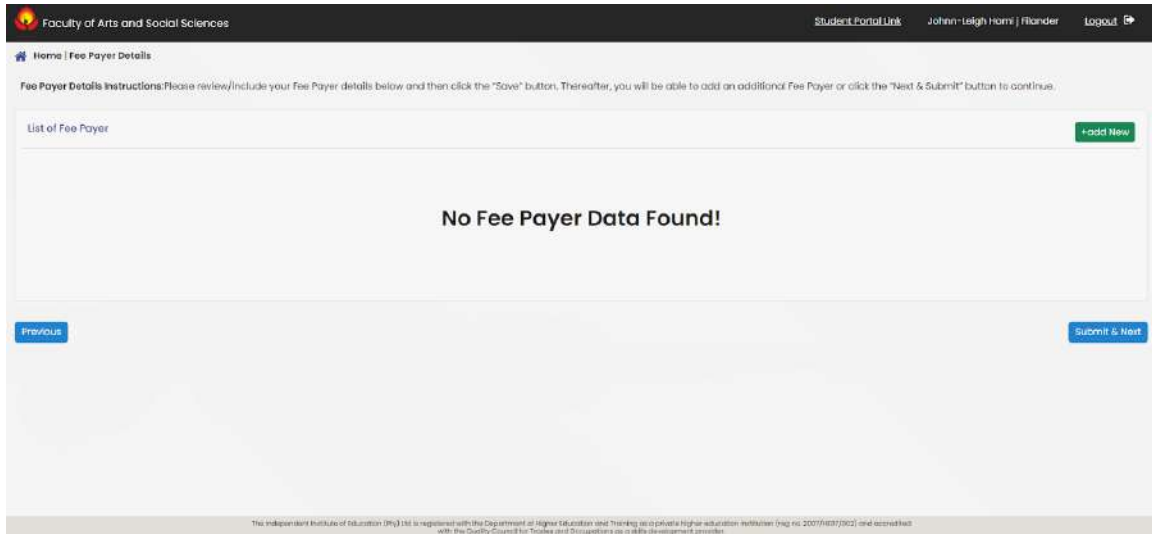


# Registration Portal (Angular)

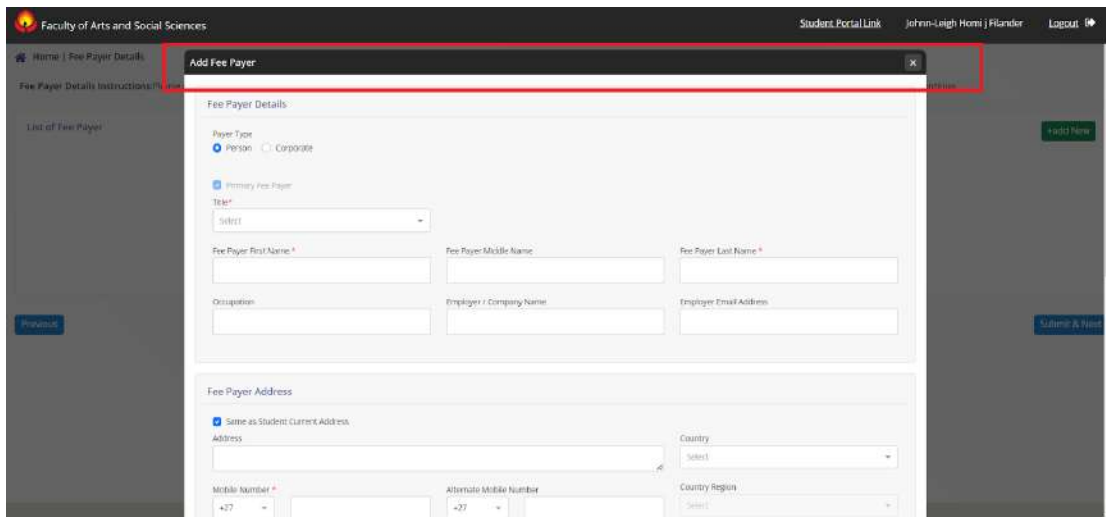
## 1. UI Design updated for menu Header similar to core ERP



## 2. Registration Portal (Angular) - update button colors to blue similar to core ERP



## 3. Registration Portal (Angular) - POPUP header background color change Similar to that of core ERP



#### 4. Font family changed on all the screens Poppins to "Open Sans"

ACAD2000A Crawford Lonehill Student Portal Link WILL00m R0'ss P000 Logout

STEP 1 Student Personal Details View/Edit

STEP 2 Address Details Total 0 | Added 1

STEP 3 Fee Payer Details Fee Payers 1

STEP 4 Registration Documents Total 0 | Added 0

STEP 5 Enrolment Status Modules 11 | Credits 0

Payment Term

Student Address Details Instructions Trans: "Please select your Payment Term for your Semester Fees below. Please note you are able to change this to view the different fee amounts before clicking the "Enrol"

Academic Term\* Brans Campus/Qualification/Intake\*\* Period \*

Crown college-Lonehill / Grade 3 R / 2019

Payment Term \*

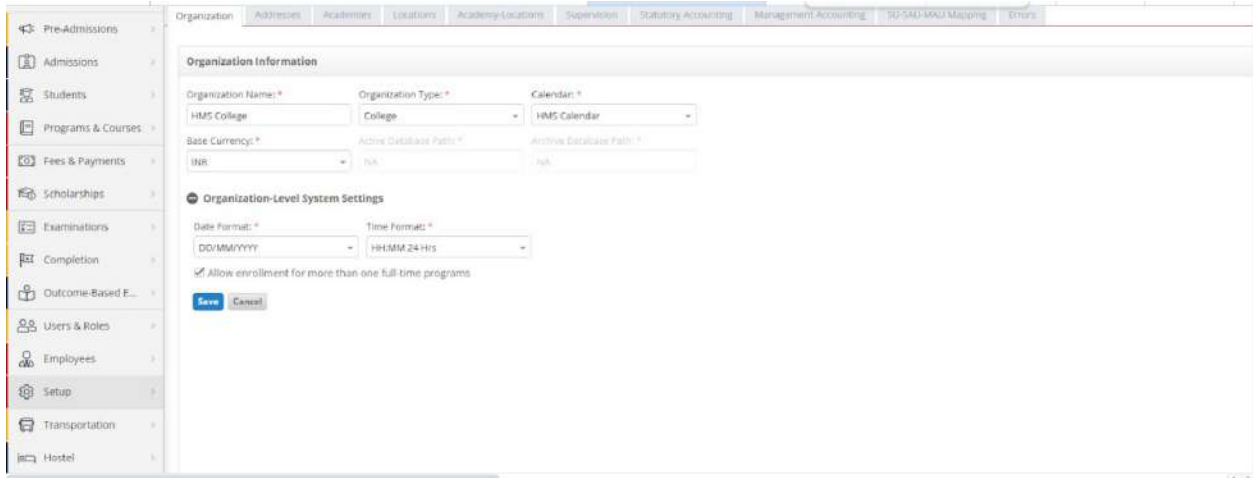
Select Payment Term Search

No Course is Available for Enrolment

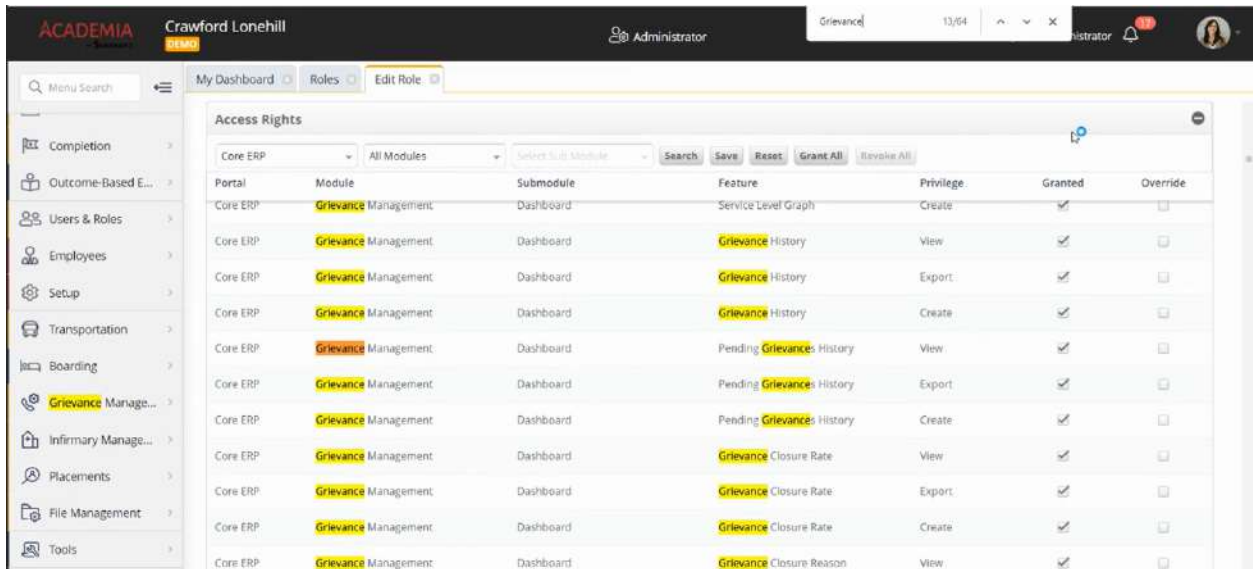
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# Core ERP

## 1. Removed “Login page background image” upload section from organization setup

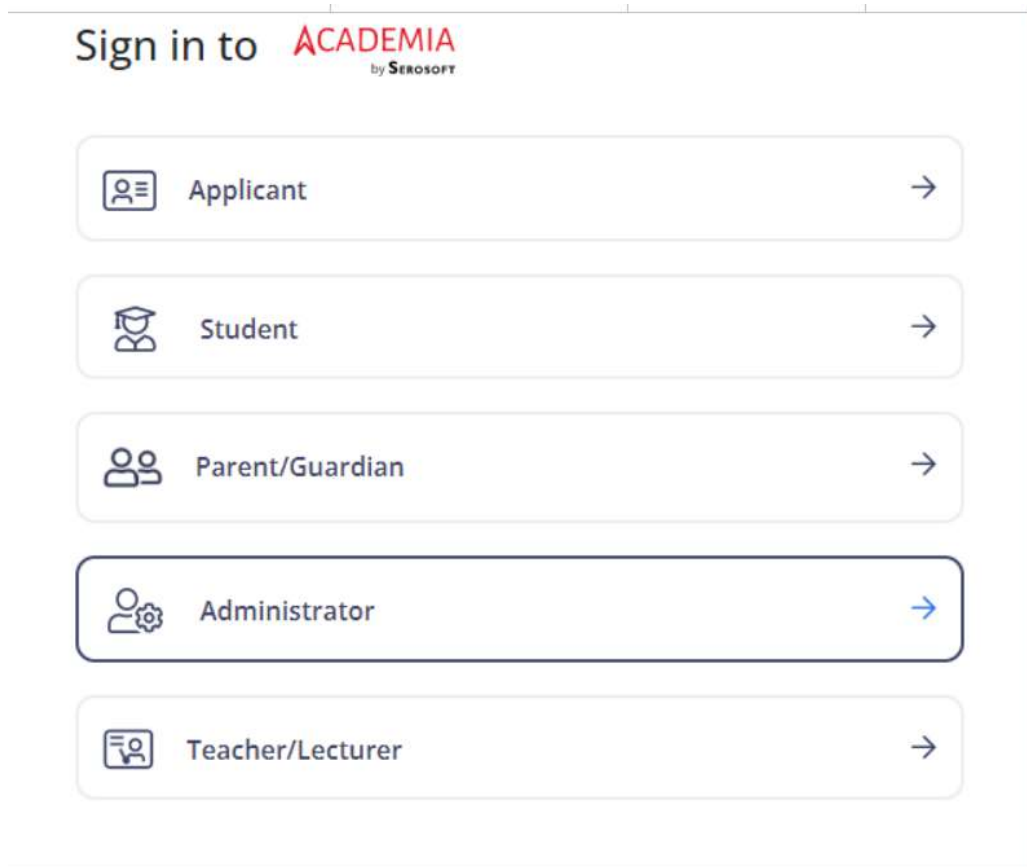


## 2. Complaint is renamed as “Grievance”

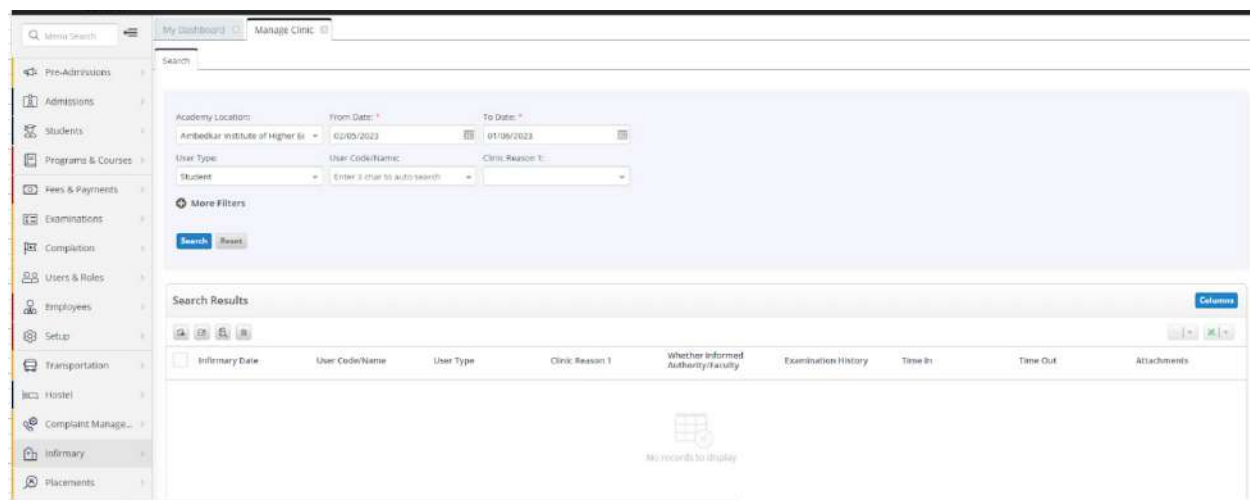




3. When user hover on tabs, Navy blue border should be displayed around it.

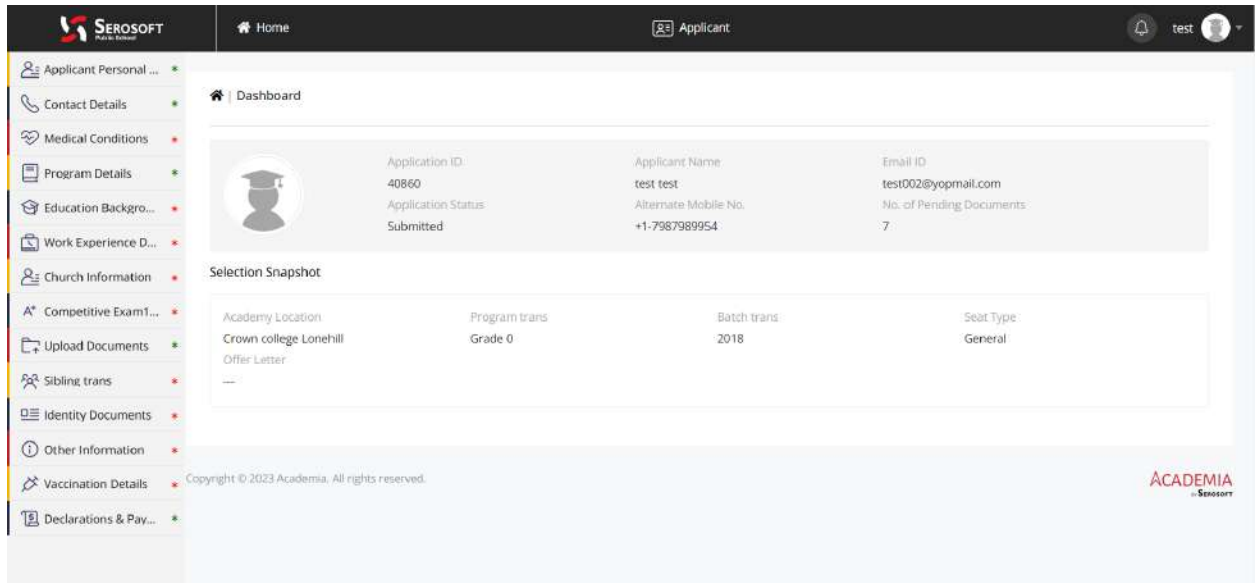


4. Infirmary Management is renamed as 'Infirmary'

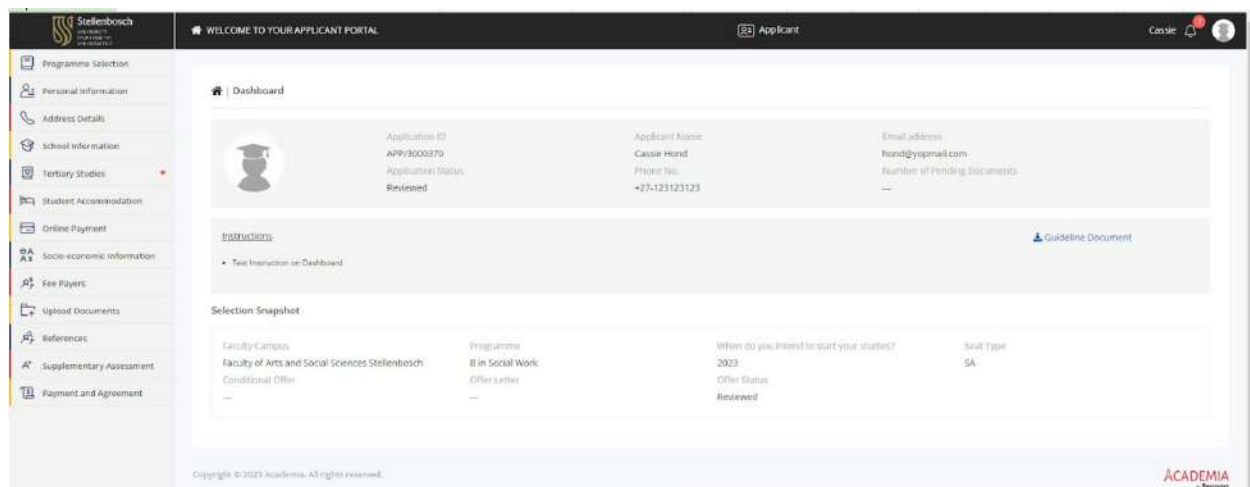


# Applicant Portal

## 1. UI Design updated for side menu similar to core ERP

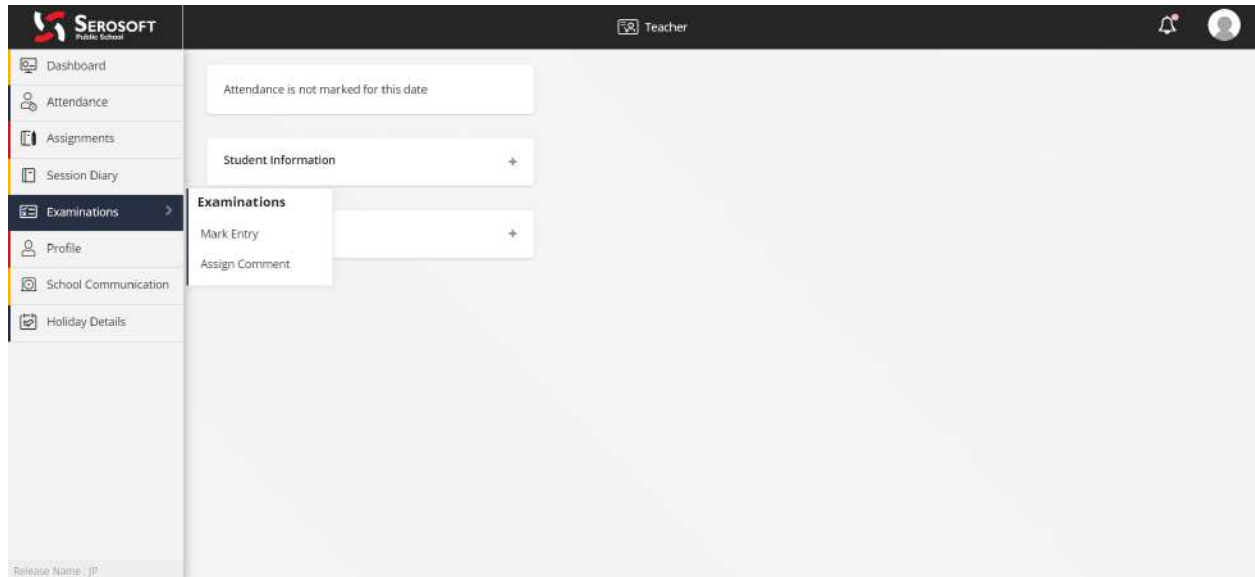


## 2. Use Asterisk in place of red dot in applicant portal menus

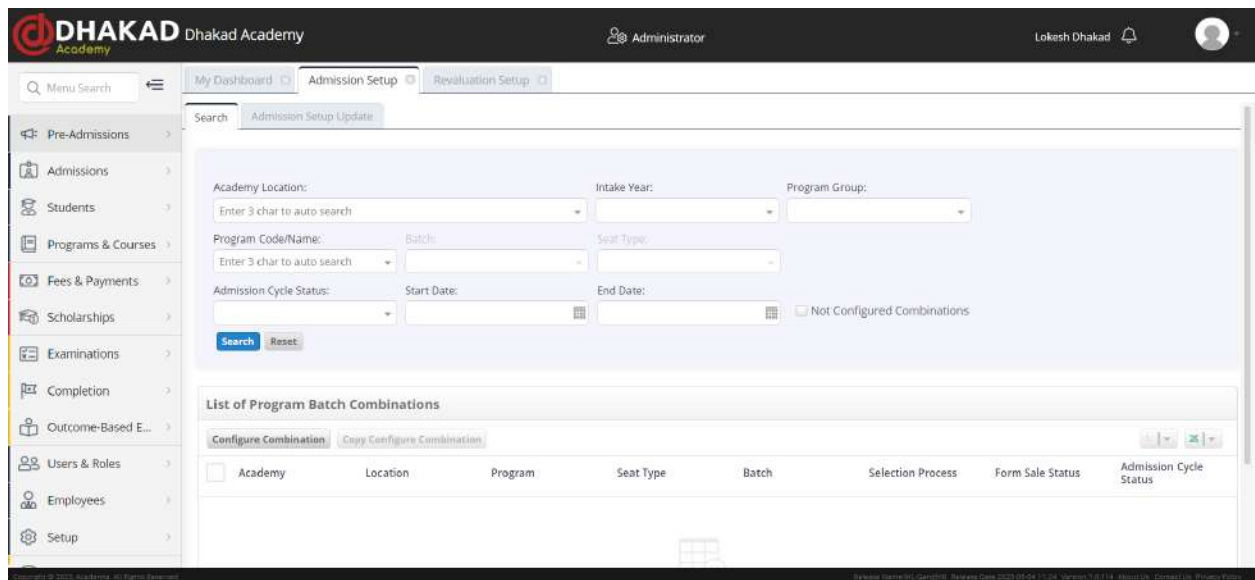


# Faculty Portal

## 1. UI Design updated for side menu similar to core ERP

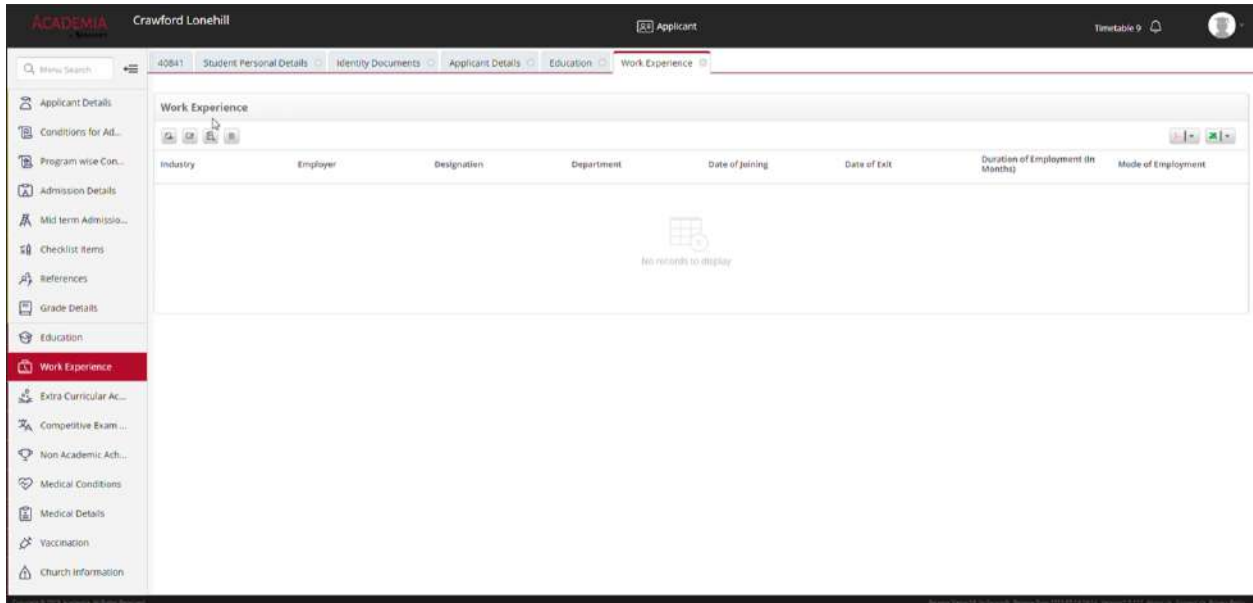


## 1. Side menu hover background color change chunk wise



# Applicant Portal

## 2. Side menu hover background color change chunk wise



# ACADEMIA

Release Notes  
**Build Name: Kalam**

Mayank S. Karkare  
Ashutosh Sharma  
Arun Ghuraiya  
31 Jul, 2023

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## Version

| Date Changed | Descriptions of Change(s) | Responsible Person                                |
|--------------|---------------------------|---|
| 31/07/2023   | Initial Draft             | Mayank S. Karkare, Ashutosh Sharma, Arun Ghuraiya |

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# Overview

## Introduction

Serosoft Solutions is glad to announce the release of the latest version of our flagship product Academia V2. The new release is coined as **Kalam**. This document is intended to share information and only information about the features and functionality introduced with the application's new release. Also, this document includes the known issues and bugs which are being evolved steadily with new development cycles.

## About Release

**Kalam** is a major release for all the clients which introduces major features & new functionality to Academia Application. It also includes various reports & Excel loaders which are critical for clients. This update enhances various processes across the application. **Kalam** also caters to some major business cases incorporated for global customers. This release also improves the flow of major modules.

# API Changes/enhancements

## What's New

### GET Application Status List

- This is a **New API created** applicable to University/ College/ School.
- **API Type** – GET
- **API** – GET Application Status
- A NEW GET API "GET Application Status List" has been added in API Framework after Upload Application Document API.
- The API has Parameters "Application status ID" & "Application Status Name".

### Canceling Receipt API

- This is a **New API created** applicable to University/ College/ School.
- **API Type** – POST
- **API** – Cancel Receipt
- A NEW POST API "Cancel Receipt" has been added in API Framework to cancel the receipts created.
- The API has Parameters "CancellationReason" & "ReceiptNumber".

The screenshot shows a web-based API documentation interface. On the left is a sidebar with a list of API endpoints: Admission, Authentication, Pre-Admission, Fees, Cancel Receipt (highlighted), CREATE Payment, CREATE Receipt, GET Transaction Detail By ID, Organization, Program, Program And Course, Setup, Student, and User. The main content area is titled 'Cancel Receipt' and includes a 'How it works' section with three bullet points: 'API is designed to capture the data and provide the required output.', 'Each API has its own method to perform the required task.', and 'API does check the information for which it is designed.' Below this is a 'Parameters' section with three input fields: 'Authorization' with the value 'bearer 8255-d5ab-e076-4718-', 'cancellationR...' with the value 'Due to service cancel-', and 'receiptNo' with the value 'RCT/0647633'. A 'Test this endpoint' section contains a blue 'TRY' button and a 'Response Type' dropdown menu set to 'application/json'. To the right, a dark panel displays a 'RESPONSE SAMPLE' with a JSON object: { "responseCode": "code", "errorCode": "value" } and a 'RESPONSE SCHEMA' section.



- If the "applicantCode" is entered incorrectly in the request parameters, it will display an error message "Invalid applicantCode. Please enter a valid applicantCode"
- If the "studentCode" is entered incorrectly in the request parameters, it will display an error message "Invalid studentCode. Please enter a valid studentCode"
- If the "sponsorCode" is entered incorrectly in the request parameters, it will display an error message "Invalid sponsorCode. Please enter a valid sponsorCode"
- If the "staffCode" is entered incorrectly in the request parameters, it will display an error message "Invalid staffCode. Please enter a valid staffCode"
- If the "currency" is entered incorrectly in the request parameters, it will display an error message "Invalid currency. Please enter a valid currency type"
- If the entered "transactionDate" is NOT in correct format/value in the request parameters, it will display an error message "Invalid transactionDate. Please enter a valid transactionDate"
- If the "receiptType" is entered incorrectly in the request parameters, it will display an error message "Invalid receiptType. Please enter a valid receiptType"
- If the "receiptMode" is entered incorrectly in the request parameters, it will display an error message "Invalid receiptMode. Please enter a valid receiptMode"

### Get Application List API fetches Preferred name field value

- This is an enhancement in the already **existing API** applicable to University/ College/ School.
- **API Type** – GET
- **API** – GET Application List
- As of now PreferredName field parameters populated the result as a combination of Name + Surname. However, after this enhancement the value for PreferredName field parameter will be fetched from the PreferredName field.

### emailAddressAlternate field from made "Optional" on the STUDENT\_CREDENTIALS\_UPDATED event API

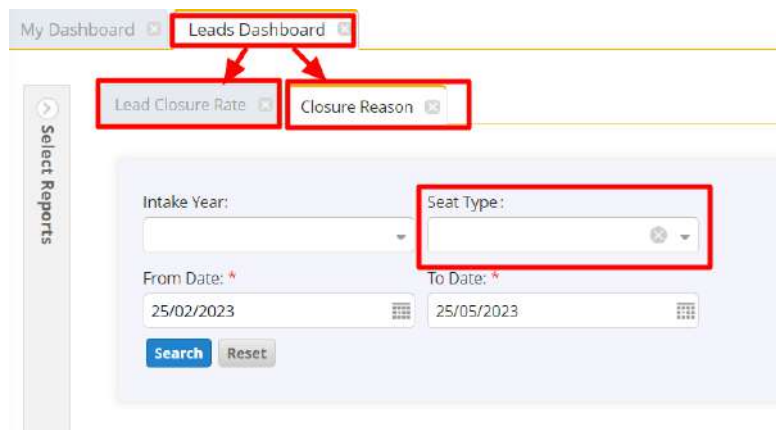
- This is an enhancement in the already **existing API** applicable to University/ College/ School.
- **API Type** – POST
- **API** – STUDENT\_CREDENTIALS\_UPDATED
- emailAddressAlternate field has NOW been made OPTIONAL for this API.

## Pre Admissions

## Enhancement

### “Seat Type” filter added in Pre-admission Reports

- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- An optional dropdown field “Seat Type”(multi select) filter has been added on the following screens:
  - Pre-Admission module > Enquiry Dashboard >**Enquiry Closure Rate**
  - Pre-Admission module > Enquiry Dashboard >**Closure Reason**
  - Pre-Admission module >**Follow-up Dashboard**
  - Pre-Admission module > **Appointment Dashboard**
- The "Seat Type" filter name is managed with Translation settings.



## Admissions

## Enhancement

### “Unsuccessful Reason” added in case of selection stages

- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- Admission > Selection Process > Selection stage > Filter search > Change Status button – After selecting “Unsuccessful” in the “modify status” dropdown, the "Unsuccessful Reason" Dropdown is available NOW to define the reason.
- The "Unsuccessful Reason" Dropdown displays the values created under the "Dropdown" option of CSM. For such a drop down item the type should be defined as **“Unsuccessful Reason”**.
- It works in the case of the “Individual” selection process ONLY.
- The "Unsuccessful Reason" field is managed with translation settings.
- For the event "Application Rejection Post Assessment Velocity", a new data provider "Unsuccessful Reason" has been added to "Application Rejection Data Provider" on "Document Template".

My Dashboard ✕ Selection Stage ✕

**Search** **Reset**

**Stage Details** ☰

- Applicants In Stage
- Stage Attribute KV
- Stage Statistics
- Transfer Seats
- Override Quota Limits
- Stage Fee Statistics

**Applicants in Stage**

**Search Results**

Enter Marks/Grade **change status**

| Applicat ID                         | Student Name | Student First Name | Student Middle Name | Student Last Name |
|-------------------------------------|--------------|--------------------|---------------------|-------------------|
| <input type="checkbox"/>            | APPS 28350   | Audre Y Sham       | Audre Y Sham        | Zone              |
| <input checked="" type="checkbox"/> |              |                    |                     |                   |

**Program selection stage status** ✕

Modify Status: +  
Unsuccessful

Unsuccessful Reason:  
[Dropdown]

Approved Date: +  
24/05/2023

Remarks:  
[Text Area]

Approver:  
System Administrator

**Save** **Cancel**

**Columns**

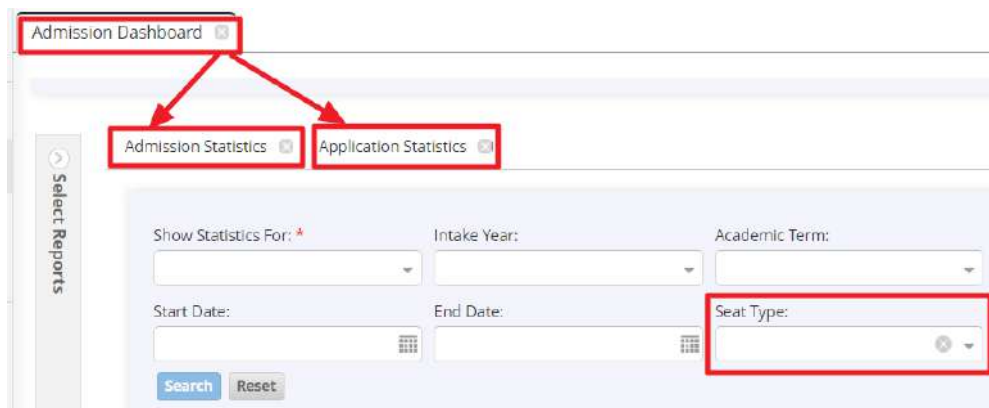
Effective Marks/C Rank Docume Status

[Submitted](#)



## “Seat Type” filter added in Admission Reports

- This is an enhancement **in already existing Functionality** applicable to **University/ College/ School**.
- An optional dropdown field “Seat Type”(multi select) filter has been added on the following screens:
  - Admission module > Admission Dashboard > **Admission Statistics Report**
  - Admission module > Admission Dashboard > **Application Statistics Report**
  - Admission module > Admission Dashboard > **Application comment**
  - Admission module > Admission Dashboard > **Admission Activity Report (Sales and Admission Enrolment Summary Report)**
  - Admission module > Admission Dashboard > **Admissions Summary by Admissions Approved on Date**
  - Admission module > Admission Dashboard > **Application Summary**
  - Admission module > Admission Dashboard > **Admissions Summary by Admissions Date**
  - Admission module > Admission Dashboard > **Sales and Admissions Summary Report**
  - Admission module > Admission Dashboard > **Application Statistics Report**
- The "Seat Type" filter name is managed with Translation settings.



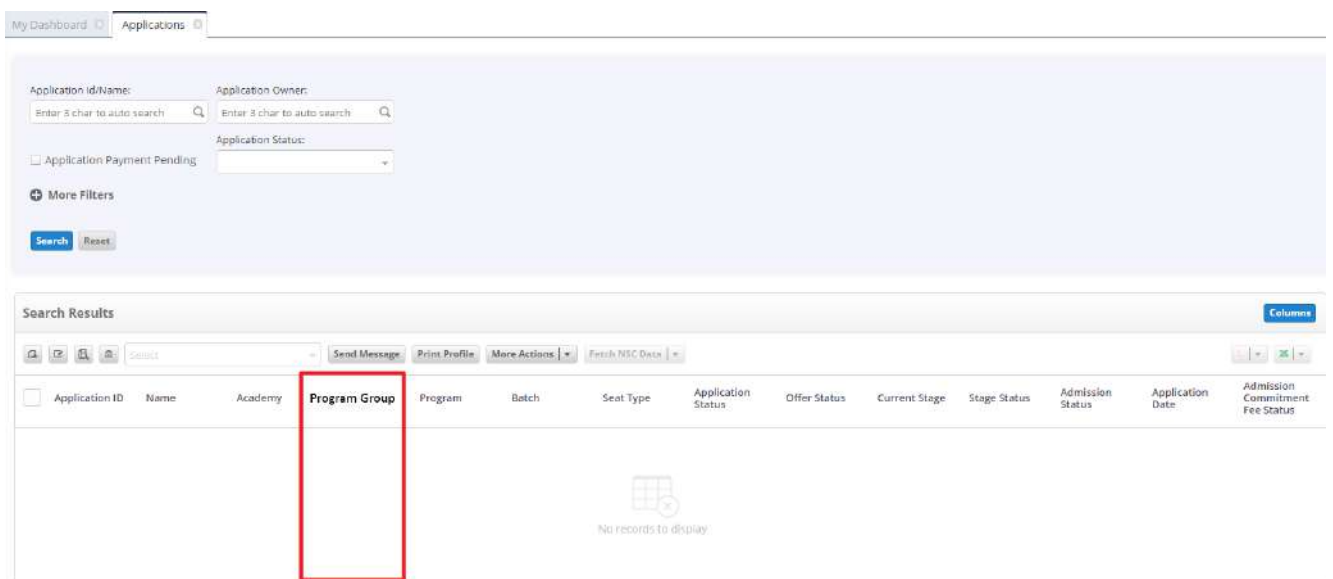
## “Preview” option added for documents in Core ERP

- This is an enhancement **in already existing Functionality** applicable to **University/ College/ School**.
- Admission module > Application > Applicant Profile > Document/Adhoc Document – A NEW column "Preview" has been added to help the admin preview the documents uploaded.
- The column name and button name both are managed with Translation settings.
- The Preview column is managed with the Data grid configuration.



## Program Group Column added

- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- Core ERP > Admissions > Applications – A new column "Program Group" has been added to the Grid on this screen.
- Column label is manageable with "translation settings".Datagrid Configuration is also applicable.



## Auto reflection of Aggregate and Eligibility data on grid after Application submission

- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- Core ERP > Application – The Value for "Eligibility status" and "Mark/Grade obtained" is NOW getting reflected automatically when the application status is updated to "Submitted" (This means the application

is created along with Program details). This applies to the applications created via “Direct Application” and “ONline” application submission.

- If there is no data available for the student's past education history then the data field will be blank.

My Dashboard Applications

Search Results1 Columns

Select Send Message Print Profile More Actions IT Fetch NSC Data Bulk Document Do

| Applica ID | Name       | Faculty                             | Faculty and Campus | Program Group | Program            | Batch_1 | Seat Type     | Applica Status  | Offer Status | Eligibili Status        | Current Stage | Stage Status | Admissi Status  | Applica Source   | Applica Date | Mark/ Grade Obtain |
|------------|------------|-------------------------------------|--------------------|---------------|--------------------|---------|---------------|-----------------|--------------|-------------------------|---------------|--------------|-----------------|------------------|--------------|--------------------|
| 49         | joy nathan | Faculty of Arts and Social Sciences | Stellenbosch       | Undergraduate | B in Social Work 2 | 2023    | International | Admission Grant | Active       | Gr 11_N O_Grade 12_YE S |               |              |                 | Direct Admission | 01/11/2023   | 68                 |
| 49         | joy nathan | Faculty of Arts                     | Stellenbosch       | Undergraduate | Adv Dip in Practi  | 2022    | International | Admission Grant | Admitted     | Gr 11_N O_Gr            |               |              | Admission Confi | Direct Admission | 01/11/2023   | 68                 |

### Application ID wise search filter in Sign up report

- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- Admission Module > Signed up report > Signed up User name – A New provision to filter with the **Applicant Id** has been made on the screen. NOW, the user can also search with Application ID. However, earlier this search option worked only for Applicant Name.

My Dashboard Sign Up Report

Search

Academy Location: Application Id/Signed Up User Name: Enter 3 char to auto search 904/Zen

From Date: To Date: Show Submitted Records

Search Reset

Sign Up List

Send Message

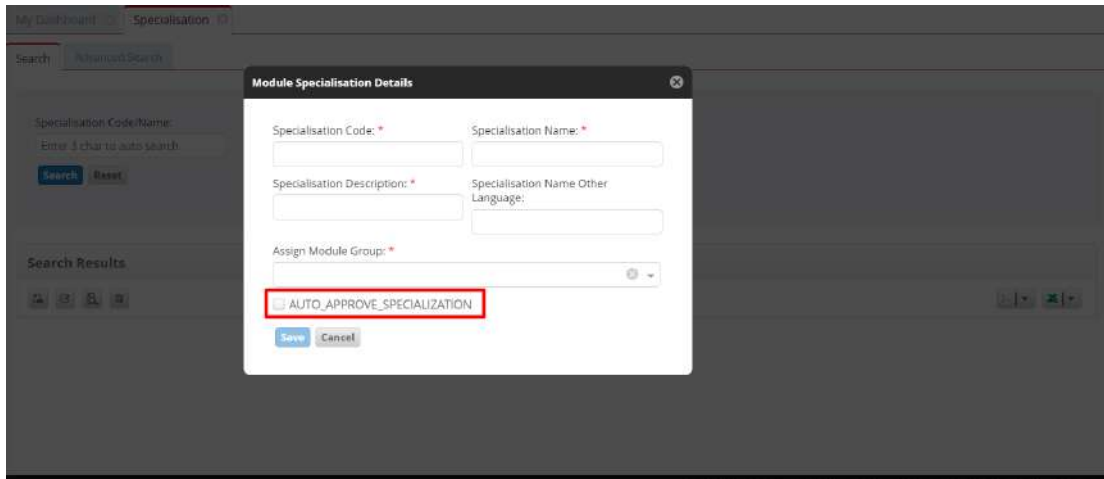
| First Name | Middle Name | Last Name | Sign Up Date | Form No. | Application Id | Source of Information | Pre Car |
|------------|-------------|-----------|--------------|----------|----------------|-----------------------|---------|
|            |             |           |              |          |                |                       |         |

## Programs and Courses

# Enhancement

## “Auto Approve” Checkbox added for Specialization Courses

- This is an enhancement **in already existing Functionality** applicable to **University/ College/ School**.
- Program & courses > Specialization > Add button > Course specialization details – A NEW optional checkbox has been added to confirm the “Auto” Approval of students enrollment for Specialization Courses.
- The Checkbox label is managed with the translation settings. The Checkbox is permission controlled.



## Student ID is NOW Hyperlinked

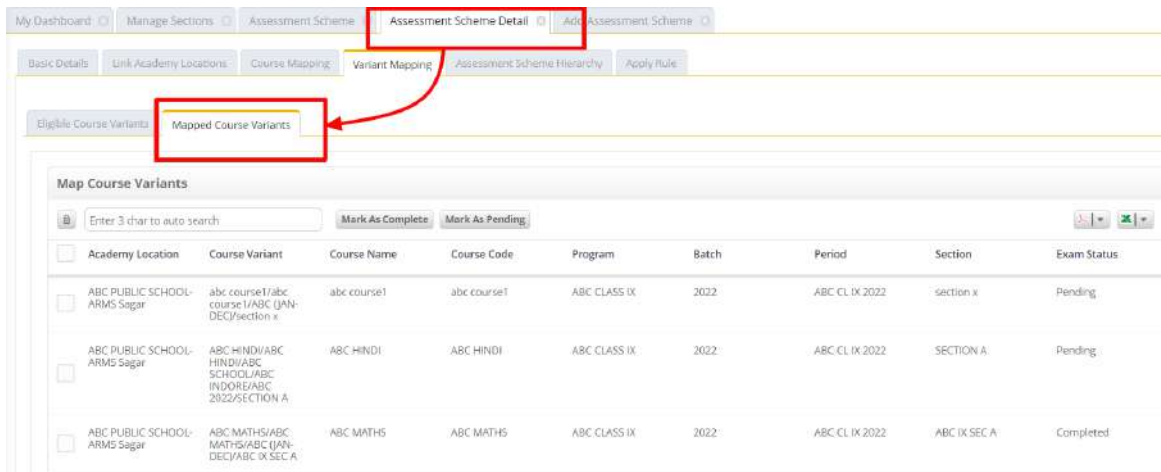
- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- The Student ID has been made an active hyperlink on the following screens to route to the respective students' profile.
- **Programs and Courses** > Student Course Enrolment > **Program Batch Section**(radio button) > Course Enrolment > Unenrolled students/Enrolled students
- **Programs and Courses** > Student Course Enrolment > **Course Section**(radio button) > Course Enrolment > Unenrolled students/Enrolled students
- **Manage Section** > **Program Batch Section** (radio button) > List of **Program Batch Section** > Enrolled students > Enrolled students grid
- **Manage Section** > **Course Sections** (radio Button) > List of **Course Sections** > Enrolled students > Enrolled students grid
- **Manage Section** > **Section Group** (radio button) > List of **Section group** > Enrolled students > Enrolled students grid

## Course Section creation enhancement

- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- Program & Courses > Manage Course Section > Add section – A New optional Dropdown field “Assessment Scheme” has been added on the screen to link the desired assessment scheme with the course variant.
- This field has been added **ONLY** for SCHOOLS.
- This Field label is managed with the translation settings.
- After selecting the assessment scheme and saving the course section, the course variant gets listed under the “Mapped Course Variants” for the assessment scheme under the Assessment Scheme Details Tab

The screenshot shows the 'Create Section' form in a web application. The form is titled 'Add Sections' and includes the following fields and controls:

- Location Code:** Text input field with value 'SDD Sagar'.
- Academic Term:** Text input field with value 'ABC (JAN-DEC)'.
- Assign Calendar:** Text input field with a dropdown arrow.
- Assessment Scheme:** A dropdown menu field, highlighted with a red box. A red arrow points from the 'Create Section' tab above to this field.
- Pre-defined / User-defined:** Radio buttons, with 'Pre-defined' selected.
- Sections Name:** Text input field with a dropdown arrow.
- Section Print Name:** Text input field.
- Maximum Capacity:** Text input field with a '+' button.
- Buttons:** 'Save' and 'Reset' buttons at the bottom left.

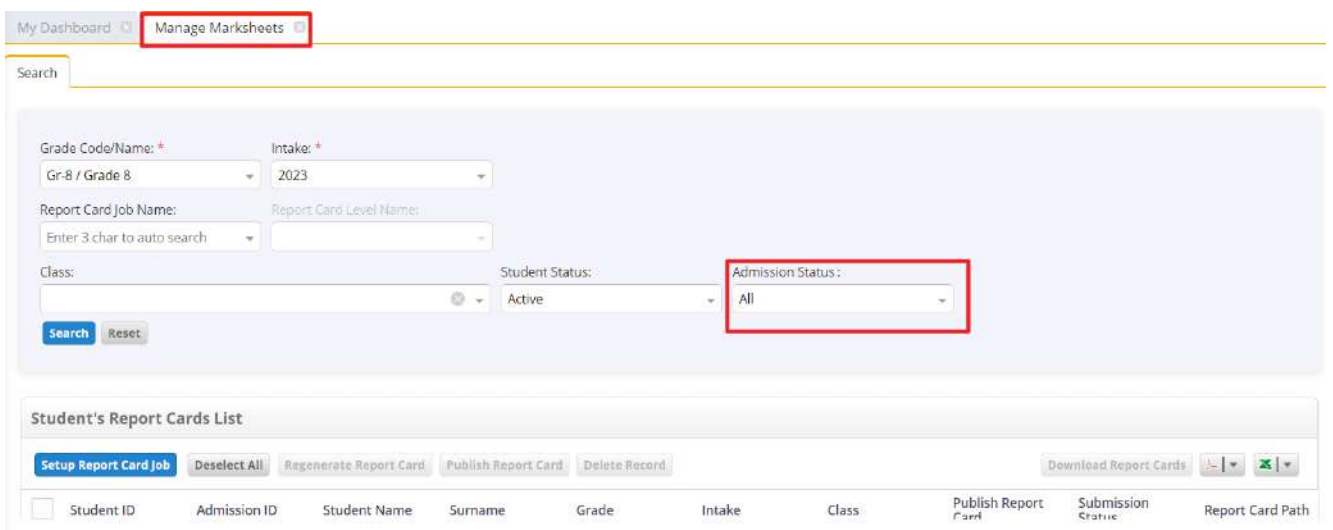


## Logics enhanced for “Co-requisites” and “Mutually Exclusive”

- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- Program & Course > Student course Enrollment > Student enrollment button – As per the newly enhanced logic, the system will NOW verify the “Co-requisite” and “Mutually Exclusive” courses on the basis of the OFFERED courses in the same program.e.g.Course 1 & 2 are “Co-requisite” courses for program A. However, Course 1 is not offered under program A. In such a case, the system will NOT restrict the student from getting enrolled in Course 2 without Course 1.

## Admission status filter on Manage Marksheet screen

- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- Examination Module > Manage Marksheet > Manage Marksheet Screen – A new "Admission status" Filter (drop down) on Manage Marksheet Screen has been added with the options to select "All", "Active" and "Inactive" Admission IDs.
- This Filter is managed with translation settings.



## Prerequisite and Corequisite Additional Criteria Field at Program Batch Level

- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- Programs and Courses > Program Batch > Batch Requisites – Additional Criteria under Prerequisites and Corequisites were earlier managed at the Organization level. However, NOW a provision has been made to apply/set such criteria at Program Batch Level.

Program Batch Details | Batch Course Requisites

### Subject Requisites

Pre-Requisites

All of the following conditions applies

AND Education Class 12 Marks Obtained Greater or Equal 50

Months Valid: \*  
1

Additional Criteria:

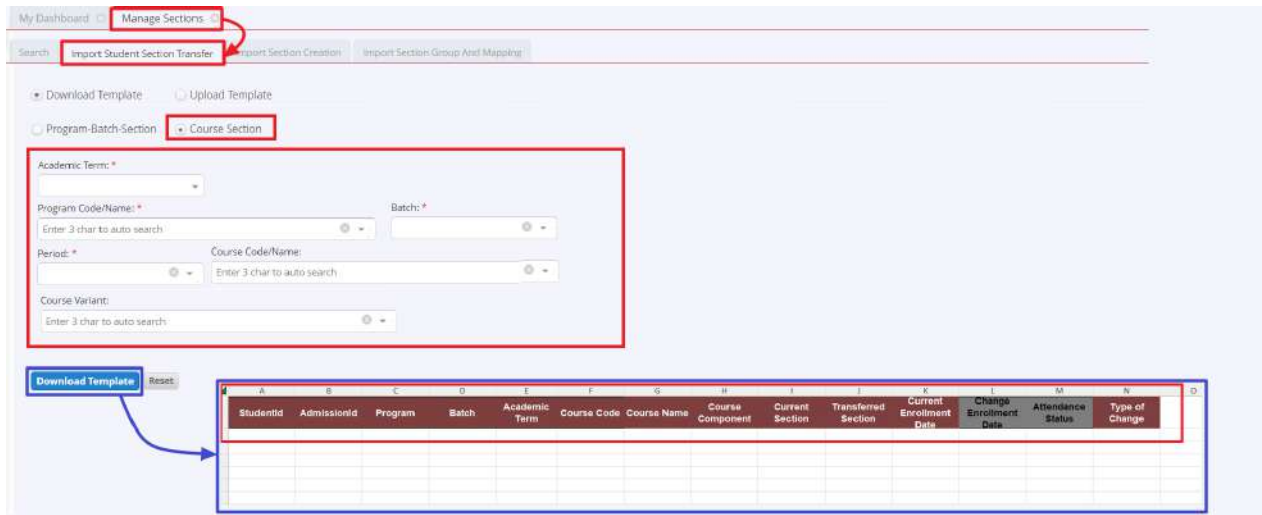
Co-Requisites

Mutually Exclusive

Reset Save

## Course Section Transfer Loaders

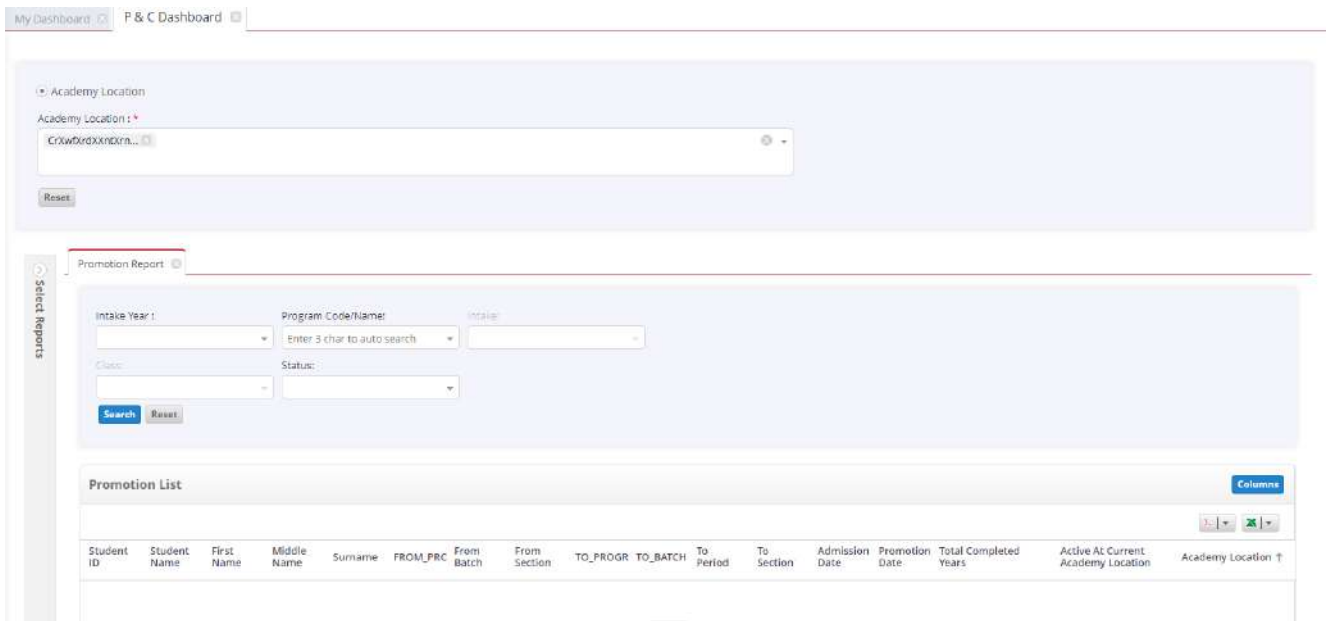
- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- Program & Courses > Manage Section > Import Student Section Transfer – “Course section” has been added under this screen to enable Bulk Section transfer possible for the Course Section type of sections.
- Checkbox labels are managed by translation settings.
- The loader offers following to be opted and defined to decide the impact of such section transfer:
  - Unenroll/De-enroll – To define the nature whether unenrollment or de-enrollment.
  - Attendance – The loader gives an option to define the attendance status of the student for whom such section transfer is executed.



## Additional columns and filter added to Promotion report

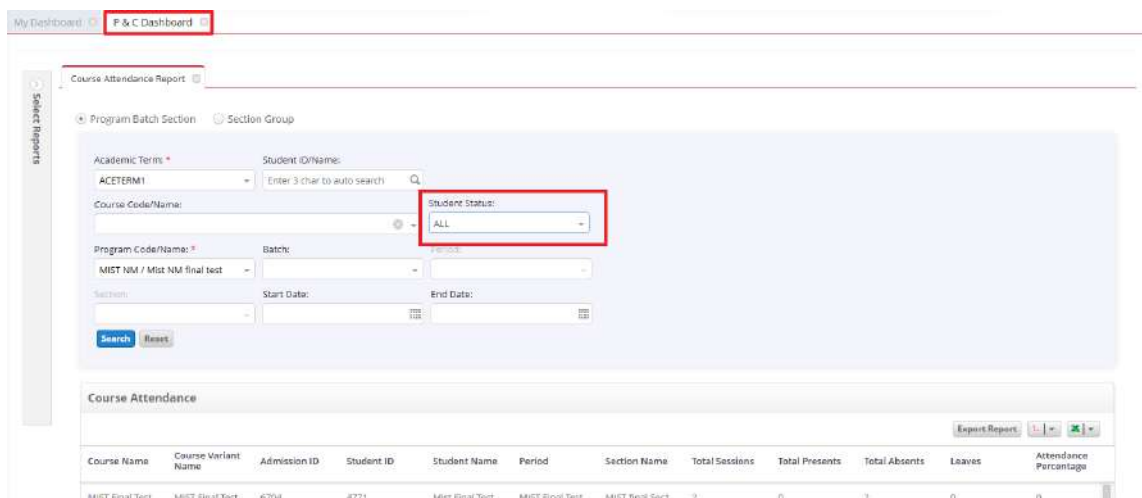
- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- Program and courses> P & C Report> Promotion Report> Promotion List – Following columns have been added to fetch the relevant data:
  - **Active at Current Academy Location** – This displays the number of months/years a student has completed in the selected Academy Location.
  - **Admission Date** – This displays the Admission Date as per the Admission ID.
  - **Total Completed Year** – This displays the number of months/years a student has completed till date.
  - **From Section** – This displays the “Section” from which the student gets promoted.
  - **To Section** – This displays the “Section” to which the student gets promoted.
- Column name is managed by translation settings and Data grid configuration. The columns are hidden by default.
- Apart from this an “Intake Year” filter has been added on the screen.
- Filter labels are managed by translation settings.





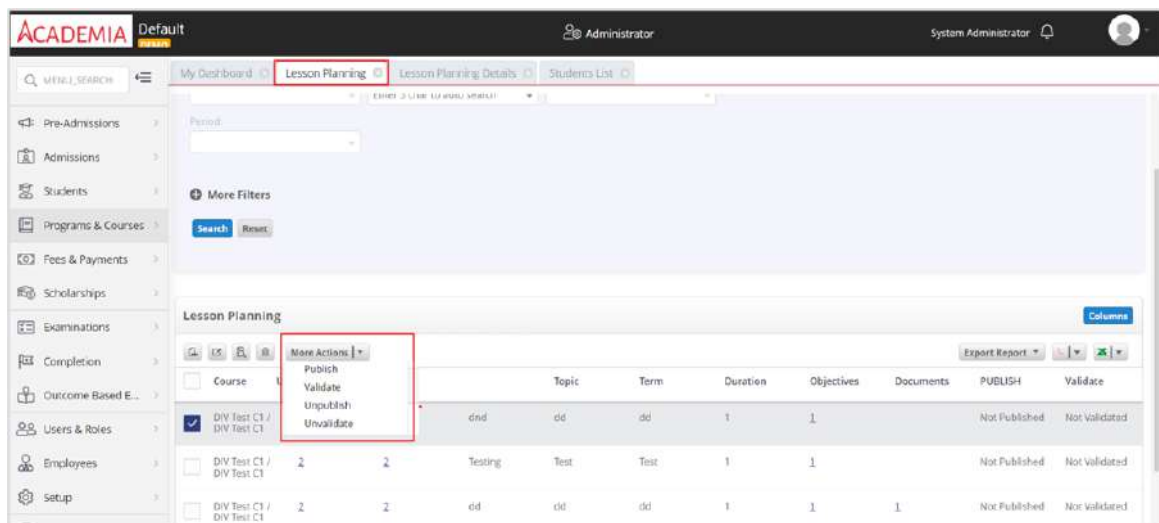
## Filter for active and inactive students in P & C dashboard Subject Attendance report

- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- Program and Course module > P n C Dashboard > Course Attendance report (PBS and section group) – A New dropdown filter field "Student Status" has been added on the screen to filter out the students data as per their status. It displays the following three values:
  - Active;
  - Inactive; and
  - All.
- This field name will be managed by Translation settings.

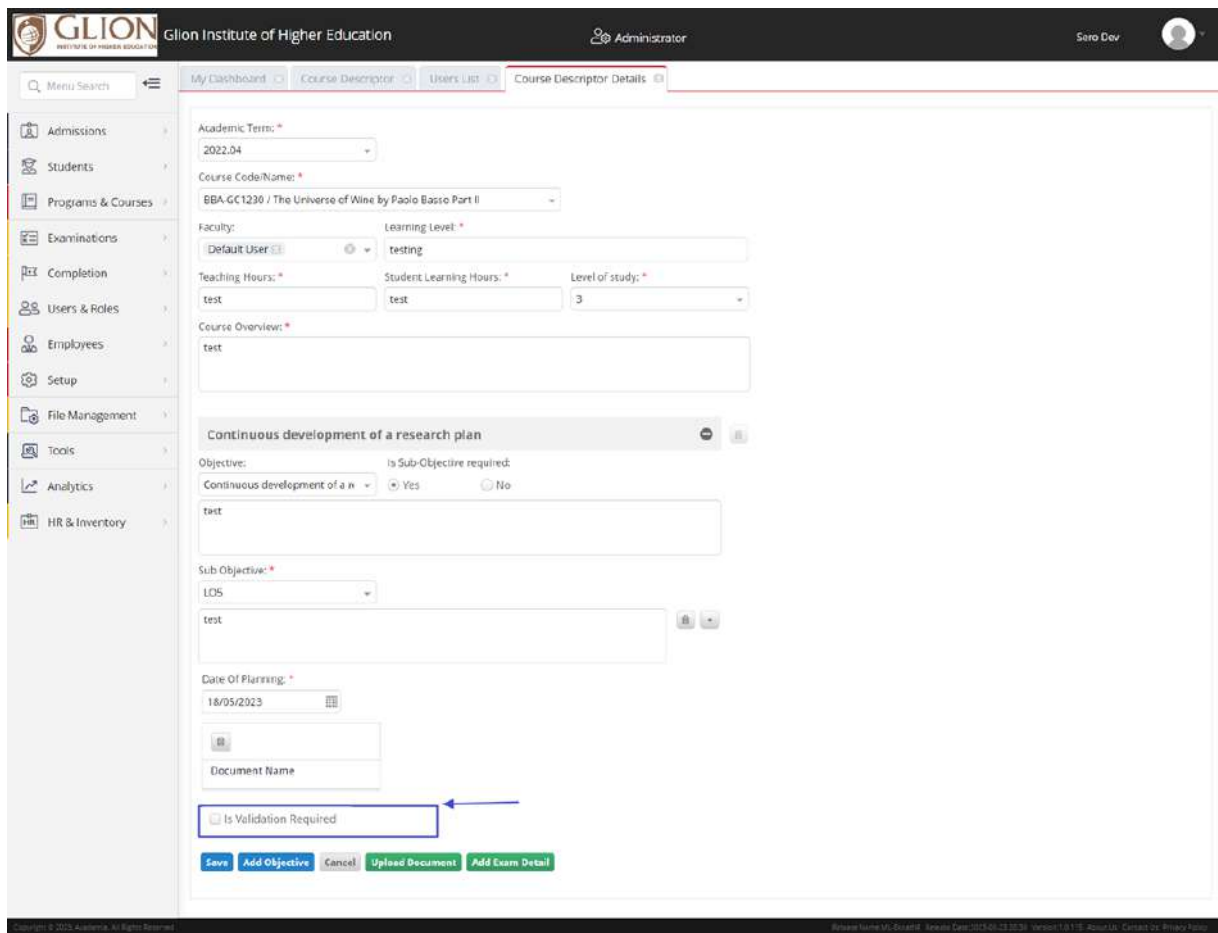
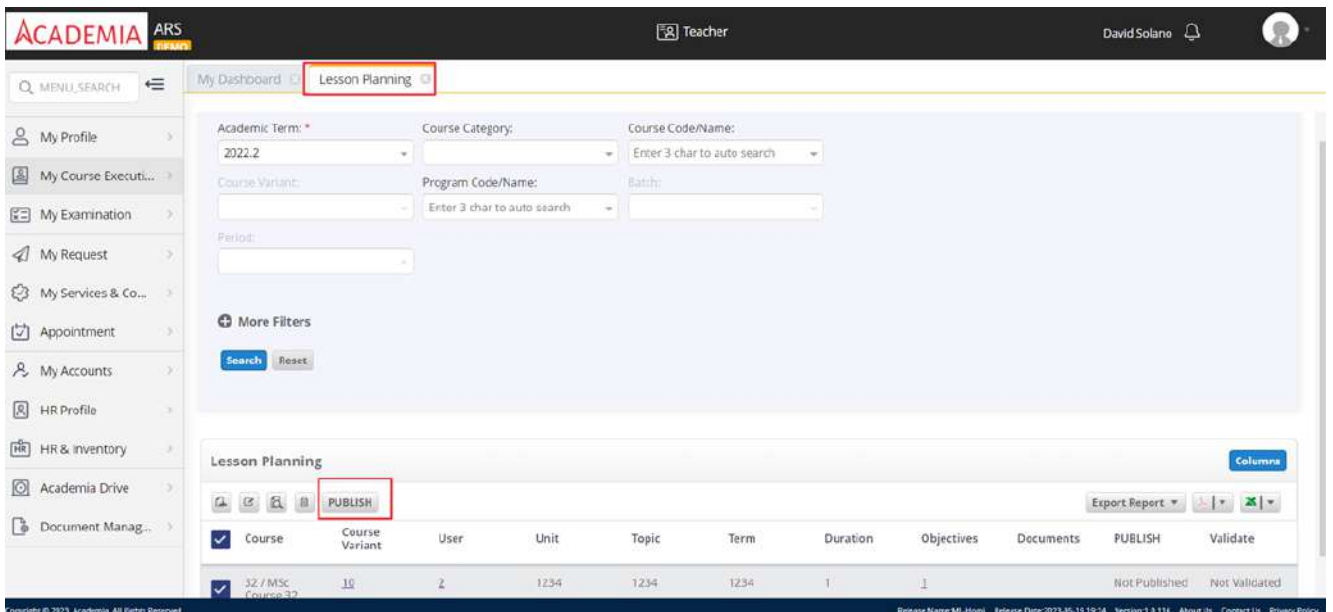


## Lesson Planning

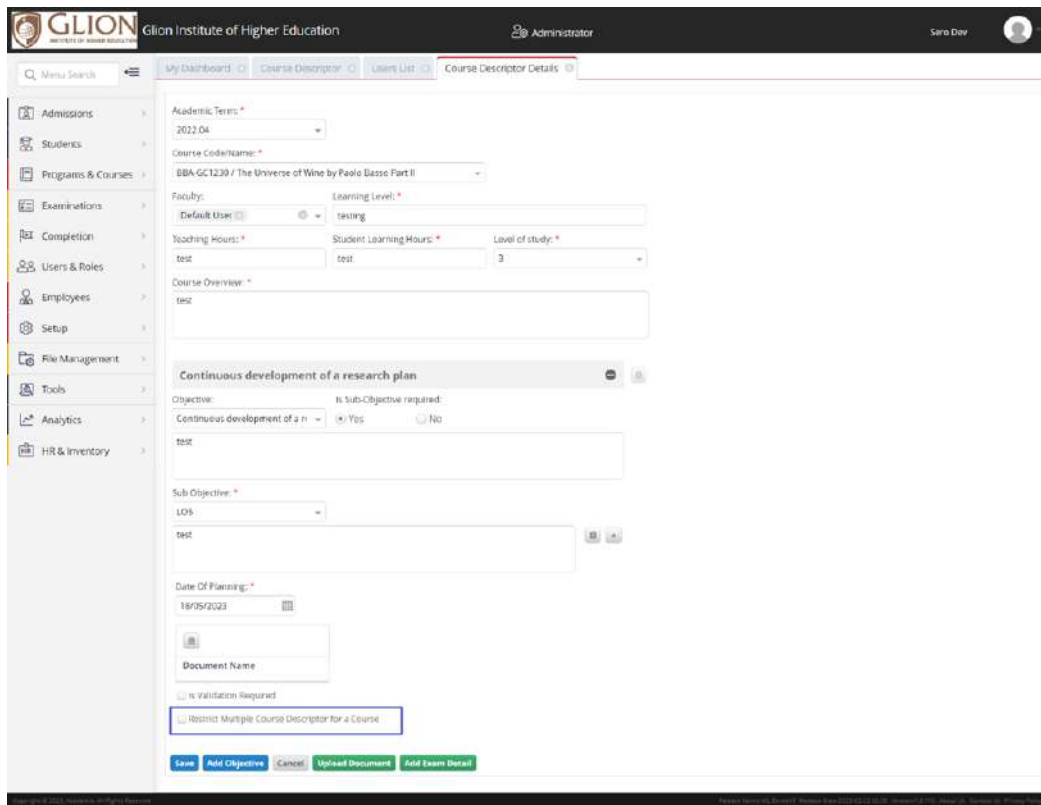
- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- Program and courses> Lesson Planning – A new button “More Action” has been added on the Screen where the user can perform all the actions mentioned below:
  - **Publish**
  - **Validate**
  - **Unpublish**
  - **Unvalidate**



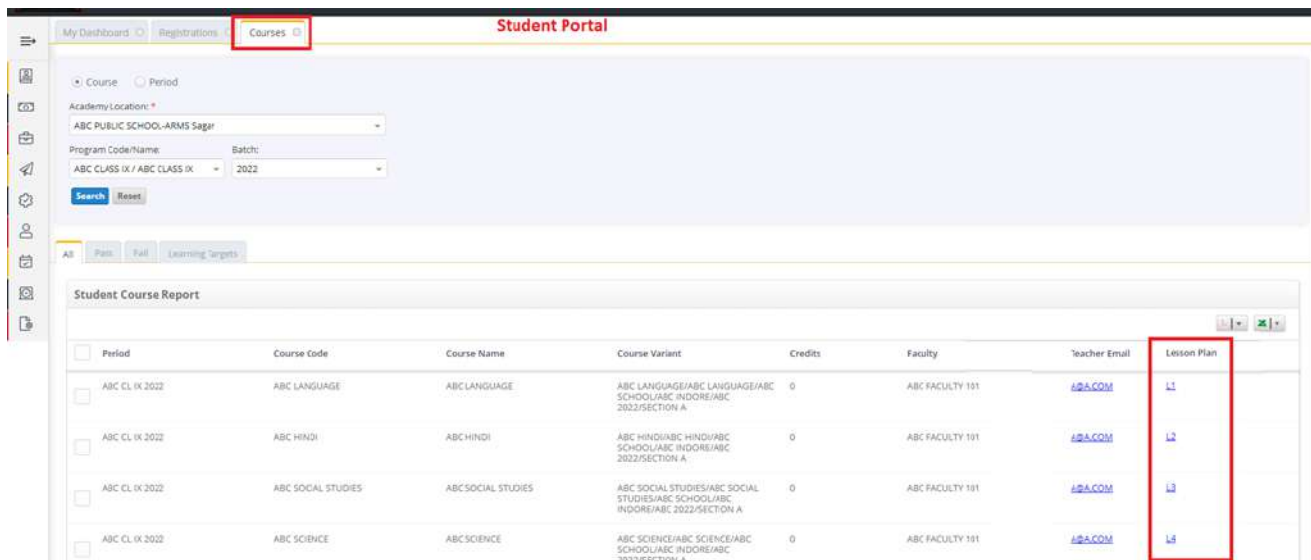
- Courses that are displayed in the course field are now filtered as per the selected Academic term.
- Dependency from the Course Variant has been removed, for creating a Lesson Plan.
- Now the lesson plan can be created with or without Course Variants.
- The Course Variants field on this screen (ERP Portal > Program and courses> Lesson Planning> Lesson Planning Details) is now managed by the DFR.
- **Faculty** field has been modified and made **multiselect**. All the users having faculty role will be displayed in the list.
- For the same functionality on the **Faculty Portal**, a button to “Publish” the Lesson Planning has been added subject to a validity check “Is Validation required”, a checkbox on the core **ERP Portal > Program and courses> Lesson Planning> Lesson Planning Details**.



- **ERP Portal > Program and courses> Lesson Planning> Lesson Planning Details.** – A new checkbox “Restrict Multiple Lesson Planning of a course” has been added on the screen to restrict the user from creating more than one Lesson Planning for a given course in an academic period.



- Data Grid has been created for the Lesson Plan screen.
- Once published, the lesson plans are displayed on the Students' Portal > My Academics > Courses where a new column "Lesson Plan" has been added on courses screen to display the Lesson Planning Report with a Hyperlink against each enrolled course. Clicking on the hyperlink will generate and download a PDF report for the same.



## Module Co-requisite functionality for already enrolled courses

- This is an enhancement in already existing Functionality applicable to University/ College/ School.

- **Core ERP** > Program & Course > Student course Enrollment > Student enrollment button > Enroll button
- **Student Portal** > Registration > Course Enrollment > Enroll button
- The Existing validation condition for Co-requisite courses has been enhanced to allow the system bypass the previously enrolled and passed courses which are defined as “Co-requisite” courses for the same student for the current period.
- Example: If Course A has Co-requisite Courses B & C, and the student already studied Course B in his previous semester. then the system will not restrict the student to enroll in course B here and students have to fulfill the Co-requisite condition for Course C only.
- This check for Co-requisite works for UI/Jason-based conditions both.

### Module Co-requisite courses applicability validation enhanced

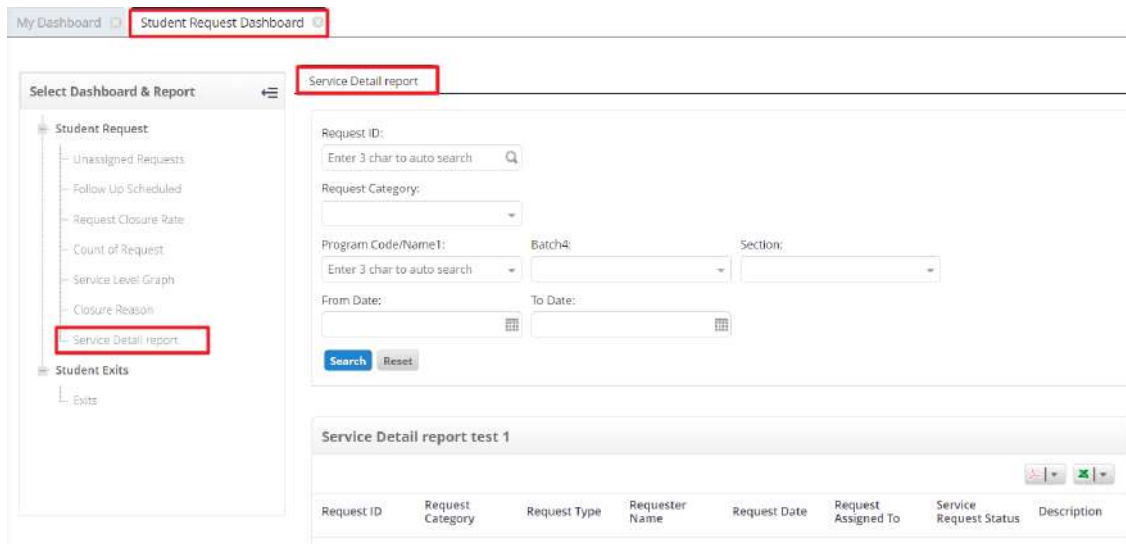
- This is an enhancement **in already existing Functionality** applicable to **University/ College/ School**.
- **Core ERP** > Program & Course > Student course Enrollment > Student enrollment button > Enroll button
- **Student Portal** > Registration > Course Enrollment > Enroll button
- The Existing validation condition for the Co-requisite course selection has been enhanced. As per NEW Change, the system will check the Co-requisite condition for the primary defined course only and not vice-versa.
- Example: Course A is a primary course for which Co-requisite is defined as Course B. When the user selects Course A and clicks on the enroll button then the system will restrict the student to enroll for Course B as well (This is already working). However, when the user selects Course B, then the system will not restrict the user to enroll for course A.

## Student

### What's New

#### Service Detail Report

- This is a **NEWLY added Functionality** applicable to **University/ College/ School**.
- Student > Student Request Dashboard – “Service Detail Report” Submenu has been added in Menu Student Request.
- The Service Detail Report screen displays the details of the students requests raised.
- It will be managed by translation settings.



## Managing passports documents

- This is a **NEWLY added Functionality** applicable to **University/ College/ School**.
- Student Module > Student list > Student Profile > Personal Information Section > “Passport” – link has been added.
- The “Passport”screen added for the same, with the following fields, to “Manage Passport” related information.
  - Passport Number
  - Country of issue
  - Passport Expiration Date
  - Is Primary
  - Upload Document
  - Upload URL
  - Modified Date
- Datagrid functionality, and DFR applicable on it.
- We also have the same feature on Core ERP Applicant profile, Student profile, and student, and Parent portal, from there, respective person can enter the information.

## New “Visa” screen added

- This is a **New Screen** added applicable to **University/ College/ School**.
- Student List > Student Profile/Applicant Profile > Personal Details – A New link “Visa” has been added in the section to route to the NEWLY added screen to capture the “Visa” details.
- This links works for all four of the following:
  - Core ERP Portal
  - Student Portal
  - Parents Portal

- Faculty Portal
- The "Visa" screen includes buttons for Add, Edit, View, and Delete operations.

The screenshot shows the 'Visa Details' screen. The left sidebar has 'Students' highlighted. The top navigation shows 'STU/0000020' and 'Visa'. The main content area displays a table with the following data:

| Visa Type | Country of issue | Date of country entry allowance | Visa Expiry Date | Visa Status | Visa applied date | Visa issued date | Visa collected date | Visa cancellation date | Reason for a visa being refused | Is Primary | Upload Document |
|-----------|------------------|---------------------------------|------------------|-------------|-------------------|------------------|---------------------|------------------------|---------------------------------|------------|-----------------|
| A         | London           | 30/05/2023                      | 01/01/2024       | Approved    | 01/01/2023        | 30/01/2023       | 28/02/2023          |                        |                                 | Yes        |                 |

Total Records: 1

- The value for the drop down fields for the screen come from **CSM > Drop Down**.

The screenshot shows the 'Common Standard Masters' screen. The 'Standard Master: Drop Down' dropdown is highlighted. The 'Master Grid' table contains the following data:

| Type test                | Name        | Value      | Value in Other Language | Sequence |
|--------------------------|-------------|------------|-------------------------|----------|
| <input type="checkbox"/> | Visa Status | test htl   | test htl                | 1        |
| <input type="checkbox"/> | Visa Status | hrl q test |                         | 2        |
| <input type="checkbox"/> | Visa Status | Approved   | Approved                | 3        |
| <input type="checkbox"/> | Visa Type   | HB1B       | HB12                    | 1        |
| <input type="checkbox"/> | Visa Type   | HB1C       | HB1C                    | 3        |
| <input type="checkbox"/> | Visa Type   | Visa type  | tete                    | 5        |

- All the column names displayed in the grid on the screen are managed through the translation settings, allowing for localization. Columns are manageable with the data grid configuration.
- Document pop-up name is manageable with translation settings.
- There is an additional option to add a document link as well in the documents section.
- All the buttons are permission controlled.
- The form is managed with the DFR settings(screen name - Visa Details Information).

My Dashboard | Dynamic Form Rendering | Configure Screen

Academy Location: \*  Screen Name: \*  Screen Mode: \*

Language: \*

---

**Search Results**

Apply for All Academy Location

| <input type="checkbox"/> | Screen Name              | Screen Mode            | Field Display Name              | Default Label                   | Field Type     | Locked   | Mandatory/Optional | Visible | New Label Name                     | Help Text                 | Default Value |
|--------------------------|--------------------------|------------------------|---------------------------------|---------------------------------|----------------|----------|--------------------|---------|------------------------------------|---------------------------|---------------|
| <input type="checkbox"/> | Visa Details Information | Create, Edit, and View | Visa Type                       | Visa Type                       | customcombobox | Locked   | Mandatory          | Yes     | VISA TYPE SP                       | <a href="#">Help Text</a> |               |
| <input type="checkbox"/> | Visa Details Information | Create, Edit, and View | Country of issue                | Country of issue                | customcombobox | Unlocked | Optional           | Yes     | Country of issue SP                | <a href="#">Help Text</a> |               |
| <input type="checkbox"/> | Visa Details Information | Create, Edit, and View | Date of country entry allowance | Date of country entry allowance | date           | Unlocked | Optional           | Yes     | Date of country entry allowance SP | <a href="#">Help Text</a> |               |
| <input type="checkbox"/> | Visa Details Information | Create, Edit, and View | Visa Expiry Date                | Visa Expiry Date                | date           | Unlocked | Optional           | Yes     | Visa Expiry Date SP                | <a href="#">Help Text</a> |               |
| <input type="checkbox"/> | Visa Details Information | Create, Edit, and View | Visa Status                     | Visa Status                     | customcombobox | Unlocked | Optional           | Yes     | Visa Status SP                     | <a href="#">Help Text</a> |               |

## Enhancement

### Application ID search field added on Student List as a filter

- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- Student module > Student list – A Smart Search filter for “Application Id/Application Name” has been added on the screen to filter out and search the student on the basis of Application ID.
- The Filter name is managed with translation settings. DFR Settings are also applicable.(“Student List”)

My Dashboard | Students List | Dynamic Form Rendering | Configure Screen

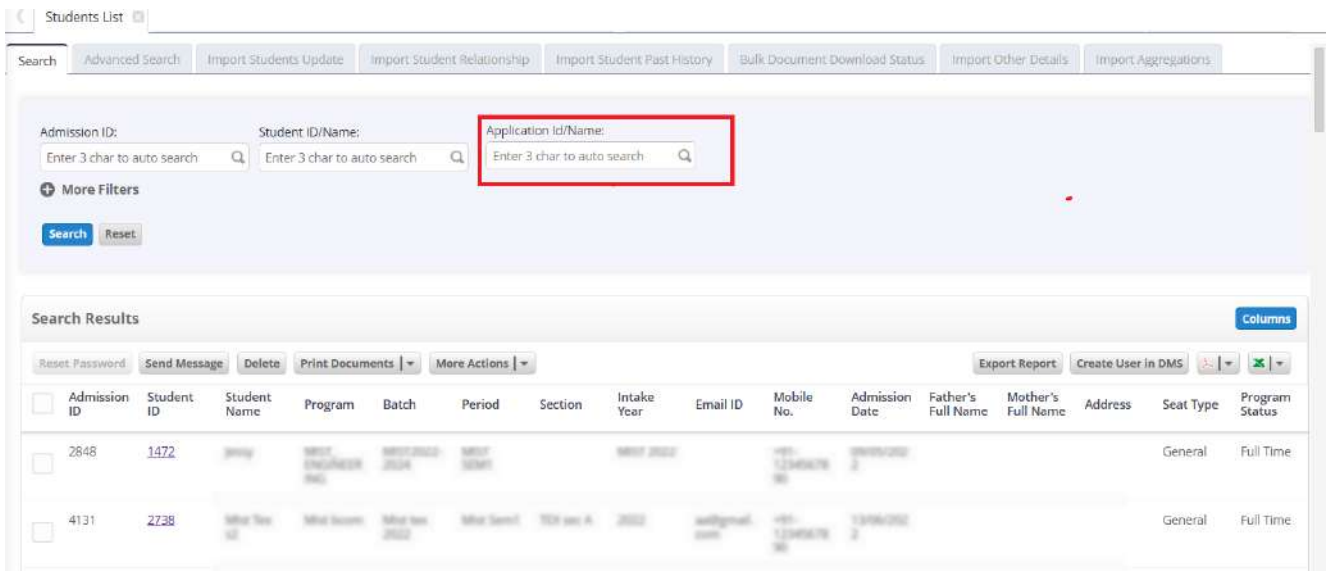
**Search Results**

Apply for All Institution Campus

| <input checked="" type="checkbox"/> | Screen Name   | Screen Mode | Field Display Name              | Default Label                   | Field Type     | Locked   | Mandatory/Opt | Visible | New Label Name                  | Help Text                 | Default Value |
|-------------------------------------|---------------|-------------|---------------------------------|---------------------------------|----------------|----------|---------------|---------|---------------------------------|---------------------------|---------------|
| <input checked="" type="checkbox"/> | Students List | View        | Application Id/Application Name | Application Id/Application Name | customcombobox | Unlocked | Optional      | No      | Application Id/Application Name | <a href="#">Help Text</a> |               |

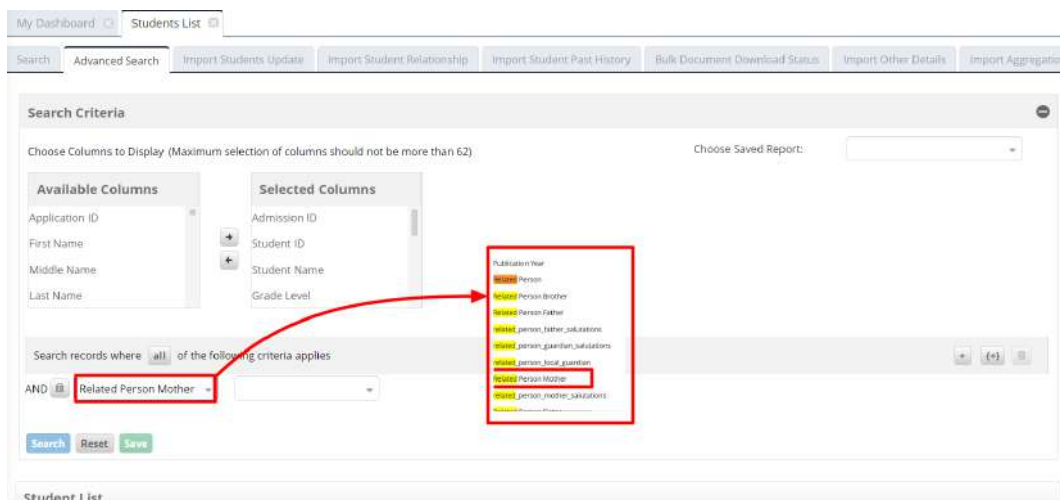
- Following are further conditions set which the system follows to fetch the details of the students:
  - **Condition 1:** when user searches by three character search all the Applicants of logged-in Academy location will appear in the list;
  - **Condition 2:** ONLY the applicants who got converted to student will appear under the Application Id/Application Name filter; and
  - **Condition 3:** ONLY the applicants (who got converted to student) whose Student Id is Active and Admission Id is Active will appear in Application Id/Application Name filter.
- When the user selects the Application Id/Application Name then all the other filters under **more filters** on the student list screen will not work.





## “Advance search”-- New item added under available filters

- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- Student List > Advance Search – A NEW parameter "Related Person Mother" has been added in the available filters.



## Additional option for Bank Details

- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- Students > Student list > (Edit Student) >Under Personal Information – A new link (permission controlled) with the name "Bank Details" has been added to capture additional “Bank Details”.
- The Hyperlink is translation managed.

- After clicking on the “Add” or “Edit” button, the pop-up screen will open up where the following 6 NEW fields have been added to enter the relevant details:
  - **"Beneficiary Name"** – text field with Alphanumeric Type (Char Limit=100).
  - **"Account No."** – text field with Alphanumeric Type (Char Limit=100).
  - **"Account Type"** – Single select Dropdown field, and the Dropdown Value is fetched from CSM>Account Type.
  - **"Bank Name"** – Smart Search dropdown field, Dropdown value is fetched from CSM > Bank Drawn On Master (Master grid, Bank name)
  - **"Branch Name"** Smart Search dropdown field, Dropdown value is fetched from CSM > Bank Drawn On Master (Child Grid, Branch Name), Value reflected as per the record selected in Bank Name.
  - **"IFSC Code"** field – Smart Search dropdown field, the Dropdown value is fetched from CSM > Bank Drawn On Master (Child Grid, IFSC Code), Value reflected as per the record selected in Bank Name.
- If the user selects the branch name, the IFSC code is auto-fetched as per the branch name & vice versa. If the bank name is changed, the branch name & IFSC code becomes blank.
- New Field should be managed by a Translation setting.
- Columns for the NEWLY added fields are also added in the “Bank Details” grid. Local datagrid options are applicable.

The screenshot displays a user interface for managing bank details. At the top, a student profile is visible with fields for Student ID (23727268), Student Name (XmbXr ClXX SXdXn), Mobile No. (+27-1234567890), and Email ID (23727268454@yopmail.com). Below this, a 'Bank Details' pop-up window is open, containing the following fields:

- Beneficiary Name: \*
- Beneficiary Name-Other Language:
- Account No.: \*
- Account Type: (dropdown)
- Bank Name: (Smart Search dropdown)
- Branch Name: (Smart Search dropdown)
- IFSC Code: (Smart Search dropdown)

Buttons for 'Save' and 'Cancel' are located at the bottom of the pop-up. A red box highlights the 'Bank Details' label in the sidebar menu and the pop-up form title.

## Displaying Machine Name along with Machine ID for Biometric Machine

- This is an enhancement **in already existing Functionality** applicable to **University/ College/ School**.
- Core ERP > Employee > Employee Profile > Course Execution > Biometric Machine Details : Add/Edit
- Core ERP > Student > Student Profile > Subject Execution > Biometric Machine Details : Add/Edit
- For the screens mentioned above On the dropdown, we NOW display the machine id and Machine name as “ID/Name”

## Changes in Program Transfer Request Form

- This is an enhancement **in already existing Functionality** applicable to **University/ College/ School**.
- Student > Student List > Raise Request > Program Transfer – Following changes have been made on the form (Core ERP/Student Portal/Parent Portal) :
- Multiple Reasons for Leaving and Remarks have been added
- Program Group and Student ID (hyperlink) have been added in the form
- It will be managed by translation settings.
- "Period" details and "Campus" details of the student will auto-populate in the form.
- A section for "Declaration" has been added where the Academy-Location Specific declaration can be added to the form. This section is managed with the "DFR" settings.
- A new checkbox in the request form has been added to confirm the Acceptance of Above Declaration.
- This New checkbox will be managed by DFR
- A new Mandatory field "Program Group" has been added to select the relevant "To program" in the form.
- This Program Group field is also managed by translation settings and DFR.

## Requester Details

1344

Requester Name:

DNY sommer std 3 (14092870)

Email ID:

a@gmail.com

Mobile:

1234555557

Admission Date:

03/08/2023

Program:

BBA in International Hospitality Business , B.Com

Batch:

CH-2022.04 , 2022 1

Period Name:

Semester 1

Academy Location:

Les Roches International School of Hotel  
Management

Campus:

Gleon

## Basic Details:

Entered By:

System Administrator

Request Assigned To:

Daniel Campi

Instructions:

Request By: \*

Academic Administrator

Request Date: \*

03/08/2023

Reason For Leaving: \*

Reason Remarks:



From Program: \*

Program Group:

To Program: \*

Batch: \*

Seat Type: \*

Period: \*

## Requester Declaration:

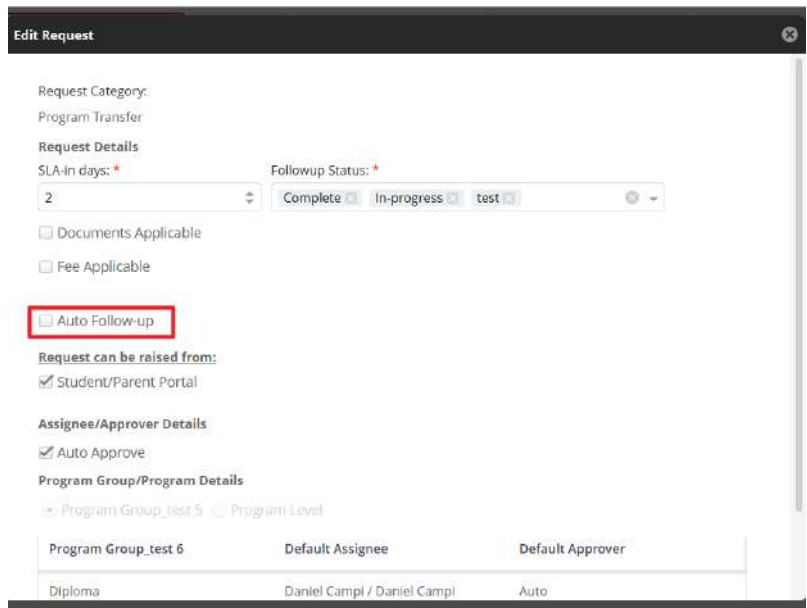
**Important Note:** International students taking the LoL (on hold status) are not allowed to stay in Switzerland / United Kingdom as their residence permit will be cancelled. They may have to re-apply for a student visa to re-enter Switzerland / UK. The health insurance through GHI, Allianz, will be cancelled at the same time as the residential permit. During the LoL period students are not considered as active. Please confirm your intention to resume your studies three months in advance (for organizational and visa application purposes)."

"Student Declaration: I confirm that all details on the form are correct. I am aware of the refund policy (please refer to " tuition" and "Other fees" documents) and I understand that by taking a LoL during the semester there will be no refund of the current semester fee (unless approved mitigating circumstances that I need to send proof of within 30 days to the Students Accounting department). Should the full due amount for the current or last semester(s) not be settled, I acknowledge the remaining balance is still due and commit that my sponsor will pay within 30 days. I confirm my sponsor is duly informed of the same."

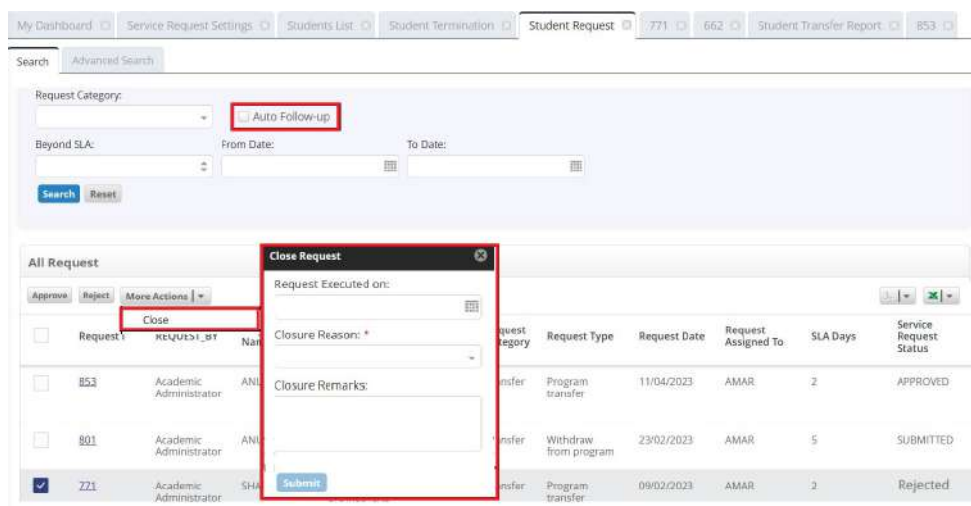
 I have read and accept the terms.

Upload &amp; Submit

- **Setup** > Service Request Settings > Program Transfer Request > Edit Request screen – An optional checkbox field “Auto Follow-up” has been added on the screen to skip the follow up process for the program Transfer request raised.
- It is managed by Translation settings.



- **Student** > Student Request – Three New buttons viz. “Approve”, “Reject” and “More Actions(Close option as on date)” have been added on the screen to help the assignee work upon the assigned request. In case of “Auto Approve” setting done, the “Reject Button” will still be available for the admin to take action on such a request if required.
- It is managed by Translation settings. DFR Settings are applicable.
- **Student** > Student Request – A new checkbox “Auto Follow-up” has been added to filter out all the requests for which “Auto Follow-up” is configured during the setup.



## Changes in Withdrawal from Program Request Form

- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- Student > Student List > Raise Request > Withdrawal From Program – Following changes have been made on the form (Core ERP/Student Portal/Parent Portal) :
- Multiple Reasons for Leaving and Remarks have been added
- Program Group, Student ID (hyperlink) and Withdrawal Effective From Date have been added in the form
- It will be managed by translation settings.
- "Period" details and "Campus" details of the student will auto-populate in the form.
- A section for "Declaration" has been added where the Academy-Location Specific declaration can be added to the form. This section is managed with the "DFR" settings.
- A new checkbox in the request form has been added to confirm the Acceptance of Above Declaration.
- This New checkbox will be managed by DFR
- A new Mandatory field "Program Group" has been added to select the relevant "To program" in the form.
- This Program Group field is also managed by translation settings and DFR.

## Requester Details

2277

Requester Name:

dg test dg test(2519)

Email ID:

Not Available

Mobile:

Not Available

Program:

Test 2

Batch:

24

Period Name:

Campus period 2

Academy Location:

Les Roches International School of Hotel  
Management

Campus:

demo test 23445

## Basic Details

Entered By:

System Administrator

Request Assigned To:

Daniel Campi

Instructions:

Request By: \*

Academic Administrator

Request Date: \*

03/08/2023

Effective Withdrawal Program Date:

Reason For Leaving: \*

Reason Remarks:



Request Reason/Remark: \*

Program Enrolled For: \*

Test 2

## Requester Declaration:

**Important Note:** International students taking the LoL (on hold status) are not allowed to stay in Switzerland / United Kingdom as their residence permit will be cancelled. They may have to re-apply for a student visa to re-enter Switzerland / UK. The health insurance through UNIL Alliance will be cancelled at the same time as the residential permit. During the LoL period students are not considered as active. Please confirm your intention to resume your studies three months in advance (for organizational and visa application purposes)."

"Student Declaration: I confirm that all details on the form are correct. I am aware of the refund policy (please refer to " tuition" and "Other fees" documents) and I understand that by taking a LoL during the semester there will be no refund of the current semester fee (unless approved mitigating circumstances that I need to send proof of within 10 days to the Students Accounting department). Should the full due amount for the current or last semester(s) not be settled, I acknowledge the remaining balance is still due and commit that my sponsor will pay within 15 days. I confirm my sponsor is duly informed of the same."

 I have read and accept the terms.

Upload &amp; Submit

- **Setup** > Service Request Settings > Withdrawal from Program Request > Edit Request screen – An optional checkbox field “Auto Follow-up” has been added on the screen to skip the follow up process for the withdrawal from program Transfer request raised.
- It is managed by Translation settings.

**Edit Request**

Request Category:  
Withdraw From Program

**Request Details**

SLA-in days: \* 2 Followup Status: \* Complete In-progress test

Documents Applicable

Fee Applicable

Auto Follow-up

**Request can be raised from:**

Student/Parent Portal

**Assignee/Approver Details**

Auto Approve

**Program Group/Program Details**

Program Group\_test 5  Program Level

|                      |                  |                  |
|----------------------|------------------|------------------|
| Program Group_test 6 | Default Assignee | Default Approver |
| Diploma              | Click to enter   | Auto             |

- **Student** > Student Request – Three New buttons viz. “Approve”, “Reject” and “More Actions(Close option as on date)” have been added on the screen to help the assignee work upon the assigned request. In case of “Auto Approve” setting done, the “Reject Button” will still be available for the admin to take action on such a request if required.
- It is managed by Translation settings. DFR Settings are applicable.
- **Student** > Student Request – A new checkbox “Auto Follow-up” has been added to filter out all the requests for which “Auto Follow-up” is configured during the setup.

My Dashboard Service Request Settings Students List Student Termination Student Request 771 662 Student Transfer Report 853

Search Advanced Search

Request Category: Auto Follow-up

Beyond SLA: From Date: To Date:

Search Reset

**All Request**

Approve Reject More Actions

Close

**Close Request**

Request Executed on:

Closure Reason: \*

Closure Remarks:

Submit

| Request ID | Request Category       | Request Type          | Request Date | Request Assigned To | SLA Days | Service Request Status |
|------------|------------------------|-----------------------|--------------|---------------------|----------|------------------------|
| 853        | Academic Administrator | Program transfer      | 11/04/2023   | AMAR                | 2        | APPROVED               |
| 801        | Academic Administrator | Withdraw from program | 23/02/2023   | AMAR                | 5        | SUBMITTED              |
| 221        | Academic Administrator | Program transfer      | 09/02/2023   | AMAR                | 2        | Rejected               |



## Changes in Leave of Absence Form

- This is an enhancement **in already existing Functionality** applicable to **University/ College/ School**.
- Student > Student List > Raise Request > Leave of Absence – Following changes have been made on the form (Core ERP/Student Portal/Parent Portal) :
- Multiple Reasons for Leave and Remarks have been added
- Student ID (hyperlink) have been added in the form
- It will be managed by translation settings.
- "Period" details , "Campus" details and Academy Location details of the student will auto-populate in the form.
- A section for “Declaration” has been added where the Academy-Location Specific declaration can be added to the form. This section is managed with the “DFR” settings.
- A new checkbox in the request form has been added to confirm the Acceptance of Above Declaration.
- This New checkbox will be managed by DFR

## Requester Profile Stu101135

## Requester Details

|                                    |  |                      |
|------------------------------------|--|----------------------|
| Requester Name:<br>Leon Garcia(15) | Email ID:<br>test@yopmail.com  | Mobile:<br>12345678  |
| Admission Date:<br>07/01/2023      | Program:<br>Bachelor of Business Administration in<br>International Hospitality Business | Batch:<br>CH-2022.04 |

|                       |  |                  |
|-----------------------|--|------------------|
| Period:<br>Semester 1 | Academy Location:<br>GIHE- Switzerland | Campus:<br>Glion |
|-----------------------|--|------------------|

## Basic Details

|                                 |                                       |               |
|---------------------------------|---------------------------------------|---------------|
| Entered By:<br>Serosoft Support | Request Assigned To:<br>Kiran Gurnani | Instructions: |
|---------------------------------|---------------------------------------|---------------|

|   |                               |
|---|-------------------------------|
| Request By: *<br>Academic Administrator | Request Date: *<br>09/06/2023 |
|---|-------------------------------|

|   |                      |                      |
|---|----------------------|----------------------|
| Request Reason: *                             | Remarks: *           |                      |
| <input type="text"/>                          | <input type="text"/> |                      |
| Request Reason: *                             | Remarks: *           |                      |
| <input type="text"/>                          | <input type="text"/> |                      |
| Request Reason/Remark: *                      |                      |                      |
| <input type="text"/>                          |                      |                      |
| Academy Location: *                           | Academic Period: *   | Program: *           |
| <input type="text" value="GIHE-Switzerland"/> | <input type="text"/> | <input type="text"/> |

|   |                        |                            |
|---|------------------------|----------------------------|
| Batch: *                                | Period: *              | Seat Type: *               |
| <input type="text"/>                    | <input type="text"/>   | <input type="text"/>       |
| Start Date: *                           | Start Academic Period: | Returning Academic Period: |
| <input type="text" value="02/07/2023"/> | <input type="text"/>   | <input type="text"/>       |

## Requester Declaration:

**Important Note:** International students taking the LoA (on hold status) are not allowed to stay in Switzerland / United Kingdom as their residence permit will be cancelled. They may have to re-apply for a student visa to re-enter Switzerland / UK. The health insurance through GIHE, Allianz, will be cancelled at the same time as the residential permit. During the LoA period students are not considered as active. Please confirm your intention to resume your studies three months in advance (for organisational and visa application purposes)."

"Student Declaration: I confirm that all details on the form are correct. I am aware of the refund policy (please refer to " tuition" and "Other fees" documents) and I understand that by taking a LoA during the semester there will be no refund of the current semester fee (unless approved mitigating circumstances that I need to send proof of within 10 days to the Students Accounting department). Should the full fee amount for the current or last semester(s) not be settled, I acknowledge the remaining balance is still due and commit that my sponsor will pay within 15 days. I confirm my sponsor is duly informed of the same."

I have read and accept the terms.

Upload & Submit

- **Setup** > Service Request Settings > Program Transfer Request > Edit Request screen – An optional checkbox field “Auto Follow-up” has been added on the screen to skip the follow up process for the program Transfer request raised.
- It is managed by Translation settings.

- **Student** > Student Request – Three New buttons viz. “Approve”, “Reject” and “More Actions(Close option as on date)” have been added on the screen to help the assignee work upon the assigned request. In case of “Auto Approve” setting done, the “Reject Button” will still be available for the admin to take action on such a request if required.
- It is managed by Translation settings. DFR Settings are applicable.
- **Student** > Student Request – A new checkbox “Auto Follow-up” has been added to filter out all the requests for which “Auto Follow-up” is configured during the setup.

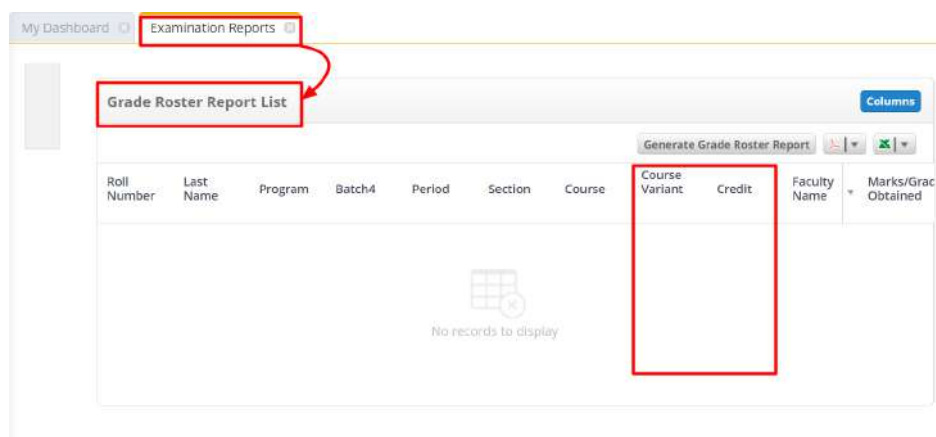
| Request ID | Requester              | Name | Request Category | Request Type          | Request Date | Request Assigned To | SLA Days | Service Request Status |
|------------|------------------------|------|------------------|-----------------------|--------------|---------------------|----------|------------------------|
| 853        | Academic Administrator | ANU  | Transfer         | Program transfer      | 11/04/2023   | AMAR                | 2        | APPROVED               |
| 801        | Academic Administrator | ANU  | Transfer         | Withdraw from program | 23/02/2023   | AMAR                | 5        | SUBMITTED              |
| 771        | Academic Administrator | SHA  | Transfer         | Program transfer      | 09/02/2023   | AMAR                | 2        | Rejected               |

# Examinations

## Enhancement

### New columns added for Grade Roster Report

- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- Examinations > Examination Reports > Grade Roster Report – Two new columns viz. “Course variants” and “Course Credit” have been added to the grid.
- Both the newly added columns are managed with the Data grid Configuration and Translation settings. They are both “Hidden” by default.



### Drop down to define CGPA SGPA calculation Rules Added

- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- Programs & Courses > Programs > Program Batch Screen – A new Dropdown Value “Current Period CGPA and SGPA” has been added in the field “SGPA and CGPA Calculation Rules”.
- After Mark Entry when the user will execute the “Result Calculation of SGPA and CGPA” job, the system will check the configuration of “Current Period CGPA and SGPA” in the field “SGPA and CGPA Calculation Rules” for the selected Program, Batch. If “Current Period CGPA and SGPA” is configured for the selected program and batch, then the system will calculate the CGPA and SGPA only for the current Period for which mark entries have been done and not for the previous period (even if any course is enrolled as repeat or backlog).

## Manage Hold Type "Result Publish" NOW applies on Publish Gradebook, Examination Results, and Student Result Reports as well

- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- **Students** > Manage Holds > Hold Sub-category and **Fees and Payments** > Manage Finance Holds > Finance Hold Details – The scope of the “Result Publish” type of hold has been enhanced and extended to the following activities:
  - Publish Gradebook;
  - Examination Results; and
  - Student Result Reports

My Dashboard | Manage Finance Hold | Finance Hold Details

**Finance Hold Details**

Finance Hold ID: ID will be auto-generated | Finance Hold Name: \* | Cut Off Date: \*

Status: \* Active | Applicable On: \* Due Fees Percentage

Hold Type: \* **Result Publish** | Minimum Percentage Due: \*

Course Enrollment  
Hall Ticket Publish  
**Result Publish**  
Promotion

### Enhancement on Apply for Revaluation screen

- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- Core ERP > Examinations > Apply for Revaluation screen, Marks and Grade columns are now splitted in individual ones. Same has been done for student and parent portal also.
- Moreover, **Faculty Name** column has been added on the same screen, and it will be hidden by default.
- On Student portal > Academics > Apply for Revaluation screen, columns can be managed by Datagrid settings.

My Dashboard | Course Registration | **Apply for Re-evaluation**

Programme Code/Name: 106 / Bachelor of Design (Space) | Batch: BDS 2018 | Period: \*

Search | Reset

**Apply for Re-valuation** Columns

Apply Now | Apply & Pay Online | Apply & Pay Offline | Reset Selection

| <input type="checkbox"/> | Course Code | Course Name | Course Variant | <b>Faculty Name</b> | Detailed sequence | Maximum Marks | Maximum Grade | <b>Marks Obtained</b> | <b>Grade Obtained</b> | Exam Result Status | Revaluation Type | Status | Applied Date | Transaction Details | Approval Status |
|--------------------------|-------------|-------------|----------------|---------------------|-------------------|---------------|---------------|-----------------------|-----------------------|--------------------|------------------|--------|--------------|---------------------|-----------------|
|--------------------------|-------------|-------------|----------------|---------------------|-------------------|---------------|---------------|-----------------------|-----------------------|--------------------|------------------|--------|--------------|---------------------|-----------------|

### Enhancement on Revaluation screen

- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- Core ERP > Examinations > Revaluation setup > Program details screen, “**Approval End Date**” field has been added.
- This will aid user to approve the revaluation application after passing the end date.

My Dashboard | Revaluation Setup

Search | Manage Rules | Programme Details

Revaluation Code/Name:  
RC001 / Revaluation Monsoon 2022

Save

Programme: \*    Batch: \*    Period: \*    Start Date KV: \*    End Date: \*    Approval End Date\_np: \*

Bachelors of Visual Arts    BVA 2023    Monsoon 2023    17/07/2023    20/07/2023    27/07/2023

## Employee

### Enhancement

#### Added Fields In Employee Profile

- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- Two new optional fields "Number of Master's Examined" and "Number of PhDs Examined" have been added on the Employee additional details screen.(Employee>Employee Additional Details)
- Both fields are number fields and Decimal and negative values are not allowed to enter.
- Both field labels are translation manageable. DFR settings (**Employee Additional Details**) are applicable.

My Dashboard | Employees List | H1000

Number of Conferences and symposia: Oral/Poster presentations: 4

Number of Conferences and symposia: Oral/Poster presentations as first or corresponding author: 5

Scopus/Google profile of external examiner: External Examiner B Scopus Google

Number of PhDs supervised over the last 5 years: 6

Number of current PhD students: 7

Number of PhDs completed: 8

Number of Masters degrees supervised over the last 5 years: 9

Number of current Masters students: 10

Number of Masters degrees completed: 11

Number of Master's Examined: 12

Number of PhDs Examined: 13

Nomination of an international examiner: 14

Amendment of an examiner: 15

Nomination of an internal examiner: 16

Personal Information

Personal Information

Address Details

Family Details

Identity Documents

Other Information

Style Sheet on Details

Employees Additional Details

Past History

Module Execution

Services & Communities

Requests

Payments & Refunds

HR Profile

Disciplinary Activity

Document History

- Two new optional fields "Highest Qualification" and "Awarding Institution" have been added on the Employee Personal details screen.(Employee> Personal Information)
- Both fields are Text fields.
- Both field labels are translation manageable.

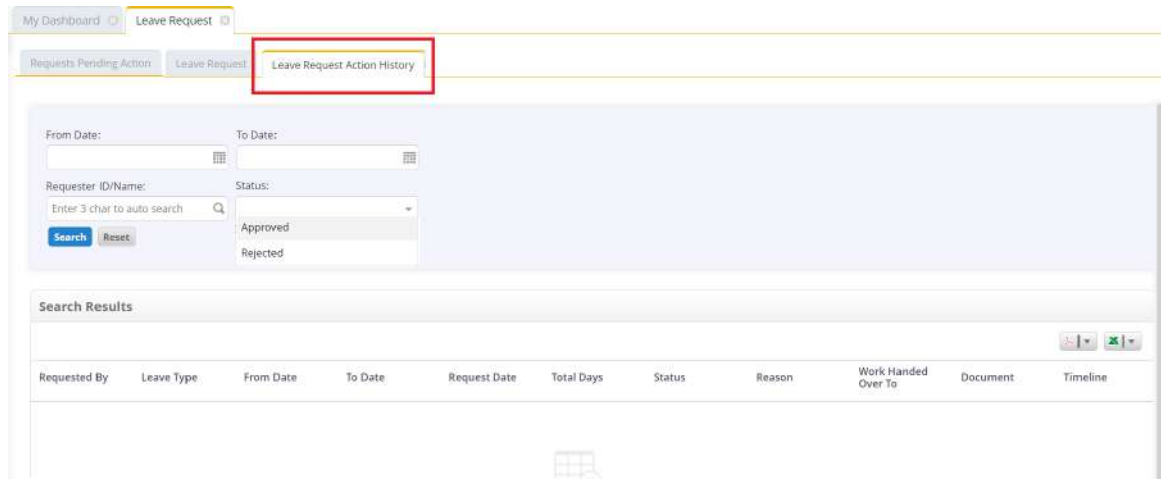
- A new optional field "Area of Expertise" has been added on the Work Experience Tab.(Employee> Past History>Work Experience)
- This field is a Text field.
- DFR and Translation Settings are applicable.
- A column to display the details is available in the grid.

| Industry                      | Employer    | Designation   | Department      | Date of Joining | Date of Exit | Duration of Employment (in Months) | Mode of Employment | Area Of Expertise  |
|-------------------------------|-------------|---------------|-----------------|-----------------|--------------|------------------------------------|--------------------|--|
| Accommodation & Food Services | food servic | Lab assistant | food department |                 |              | 0                                  | Full Time          | java   |
| Accommodation & Food Services | test        |               |                 |                 |              | 0                                  | Full Time          | 1bc siffsfdfds sdfds sdf abc sdiffafds sdiffds sdf abc sdiffafds sdiffds sdf abc sdiffafds sdiffds sdf |



## Added New tab to track leave request action history

- This is an enhancement **in already existing Functionality** applicable to **University/ College/ School**.
- A new tab "Leave Request Action History" has been added to show the action history for the leave requests where the user's action is required. This has been done for the following screens:
  - Faculty Portal > HR Profile > Leave Request > Leave Request Action History
  - Responsive Faculty Portal > Leave request > Leave Request Action History
- The Tab name is managed by translation settings. The Tab is permission control.



## Enhancement on Leave Credit Settings screen

- This is an enhancement **in already existing Functionality** applicable to **University/ College/ School**.
- Employee Module > Leave Credit Settings Screen, **“Leave setup if Employee type is changed”** added.
- This will aid users to manage the leave type, after the employment type is changed.
- This will work for only Employee Attribute based leave.
- This will have the values on the basis of leave credit settings, that is leave encashment, leave carry forward, and leave lapse.
- This can be managed by translation settings.

## Fees and Payments

# Enhancement

## Bills get generated for Additional Courses NOW

- This is an enhancement **in already existing Functionality** applicable to **University/ College/ School**.
- Programs & Courses > Student Module Enrolment > Student Enrolment button > **Additional course button**  
– On additional course screen, once the student gets enrolled in the additional course, the Bill for the same will get triggered.
- Similarly, on Unenrolling and de-enrolling, the bills will get canceled automatically.

## Additional option for Bank Details

- This is an enhancement **in already existing Functionality** applicable to **University/ College/ School**.
- Fee & Payment > Manage Payment > Add/View – A NEW Dropdown Field "Payment On" (By default optional & Hidden) has been added to fetch the account details of the students/sponsor for the payment to be done. This field will be active ONLY in case of "Bank Payment".
- Payment To Student: Dropdown value is fetched from:
  - Core ERP > Students > Student list > (Edit Student) > Under personal Information > Bank Details where payment to is Student; and
  - Core ERP > Students > Student list > (Edit Student) > Personal Information under bank details, value listing as per the Student selected in the Student id/Name field
- Payment To Sponsor: Dropdown value is fetched from – Scholarship > Sponsor Master > (Select Sponsor) > Contact person details(Child Grid) > Add/Edit where payment to is Sponsor, value listing as per the Sponsor-selected in Sponsor Id/Name field
- The value would be a combination of "Beneficiary Name/Account Number".
- The field is manageable through the Translation setting & DFR settings ("Manage Payments") are applicable.
- This field also works in case of "Make Payment" loader. The field is manageable with the Configure Loader functionality.

My Dashboard Manage Payments Payment Detail

### Payment Detail

Payment Mode:  Bank Payment  Cash Payment     
 Payment Type:  Regular

Academy Locations: \*      
 Cost Center:

Payment Voucher No.:      
 Payment For: \*      
 Payment To: \*

P&C Fee:

Paying IAU:      
 Payment Date: \*

Student ID/Name: \*      
 Payment Currency: \*      
Payment On:

Payment Mode: \*      
 Instrument No.:      
 Instrument Date: \*      
 Amount: \*      
 Our Bank Accounts:

Narration:

Auto Settle:  Yes  NO

## “All” added as status value under Statement of Accounts

- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- Fees and Payments > Statement of Accounts – One more drop value under Status - "All" has been added in the filter to fetch the records for both inactive and active students together.

My Dashboard Statement of Account

Search

Actual Transaction   
 Voucher Based

Academy Location:

Statement For: \*      
 Student ID/Name:      
 Status:

Program Category:      
 Program Group:

Batch:      
 Seat Type:

Statement From:      
 Statement To:

## Recurring discount on Course fee definition

- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- Fees and Payment > Manage Fee Plans – Fee plans for course fee definition are NOW visible on the "Manage fee plan" screen as Course type, Active, and Mapped.
- The fee rule will be the “Course enrollment” stage, for a specific person rule.
- Fee heads will be the same as created while creating course fee definition.
- The Fee plans for Course fee definition are editable for adding discount applicability.
- The “delete” button and "Apply” option and "Payment term setting" in more actions are disabled for such Fee Plans. Only the edit and the view buttons are enabled.
- Fee Heads configured under the rules can be Edited to confirm if discount is to be allowed. (check box). If Yes, discount heads, and their applicability can be defined.
- The remaining functionality is the same as existing for the “Recurring Discount”.

My Dashboard: Manage Fee Plan

Search Import Persons Covered Import Fee Plan Import Persons Covered Update

Program Code/Name: Enter 3 char to auto search Intake:

Seat Type: Fee Plan Type: Courses Fee Plan Name: Course fee - 13463-214/History

More Filters Search Reset

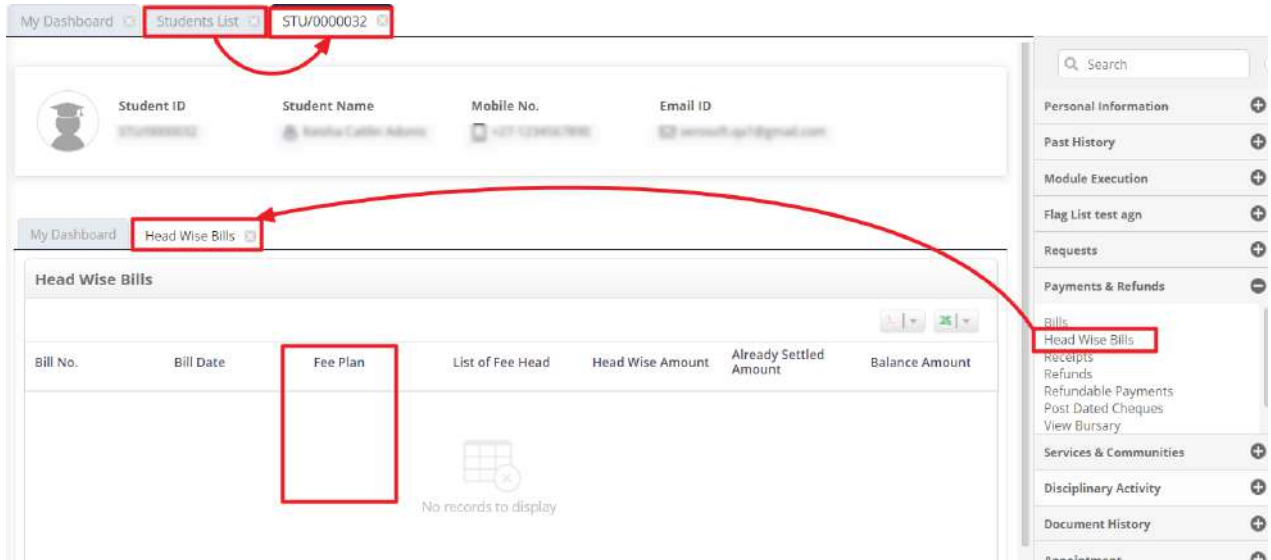
List of Fee Plan Columns

| Fee Plan ID | Fee Plan Name                      | Fee Plan Type | Approval Status | Mapped to any Student | Fee Plan Rule        |
|-------------|------------------------------------|---------------|-----------------|-----------------------|----------------------|
| FP0154      | Module fee - 13463-214/History 214 | Courses       | Active          | Mapped                | <a href="#">View</a> |

Total Records: 1

## Fee Plan column under Head wise Bills in the student profile

- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- Student--> Student List --> Student Profile --> Payments and Refunds--> Head Wise Bills – A NEW column “Fee Plan” under Head wise Bills grid in the student profile has been added to display the Fee Plan details.
- Column name is managed by translation settings.
- The Newly added column appears in the Student Profile on Core ERP, Student Portal and Parents Portal.



## "Generate bills at the time of student late admission"

- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- On the "Fee Rule" screen a new optional checkbox "Generate bills at the time of student late admission" has been introduced which, if checked, would trigger the past dated bills for the recently admitted students, based on the billing schedule of the fee heads configured.
- This checkbox works for the "Program" type of fee plan – "Course Execution" stage – "Generate Bill as per Billing Schedule" option ONLY.
- The checkbox is managed by DFR. Translation settings are applicable.
- The trigger point for such a Fee Rule is "Approve Admission".

The screenshot shows the 'Fee plan rule' configuration form. The form includes the following fields and options:

- Fee Plan Rule: 2 (Document Required)
- Rule Applicable on:  Normal Rule  Specific Person  Additional Rule
- Select Rule: Domicile State
- Fee Plan Rule Description: ABC
- Fee Plan Rule Status: Active
- Stage: Course execution
- Generate bills as per the payment schedule   Generate bills at the time of student registration
- Generate Bills as per student late admission**  (highlighted with a red box)
- Selection Till Date: [Calendar icon]
- Online Payment Configuration
- Save Cancel

## Fee Rule association report Changes

- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- Core ERP > Fee & Payments > Fee Report > Fee Rule Association > (Filter) – The Data in the grid will NOW, get displayed in alphabetical order (A to Z)
- The Column name “Sequence” will NOW be displayed as “Fee Plan Rule”

The screenshot displays the 'Fee Rule Association' report interface. At the top, there are filter options for various faculties and a dropdown menu showing fee rule details. Below the filters, there are input fields for 'Fee Plan Type' and 'Fee Stage', along with 'Search' and 'Reset' buttons. The main part of the interface is a table with the following columns: Admissi ID, Student ID, Student Name, Faculty, Faculty and Campus, Date of Admissi, Program, Batch\_IT, Period\_I, Fee Plan Applied Date, Fee Plan-, fee plan rule, Previous Fee Plan Name, Previous fee plan rule, and Fee Stage. The 'fee plan rule' column is highlighted with a red box, showing the value 'default stage'.

| Admissi ID  | Student ID | Student Name  | Faculty                             | Faculty and Campus | Date of Admissi | Program  | Batch_IT | Period_I | Fee Plan Applied Date | Fee Plan- | fee plan rule | Previous Fee Plan Name | Previous fee plan rule | Fee Stage     |
|-------------|------------|---------------|-------------------------------------|--------------------|-----------------|----------|----------|----------|-----------------------|-----------|---------------|------------------------|------------------------|---------------|
| ADM/0000376 | STU/000376 | Alice Lombard | Faculty of Arts and Social Sciences | Stellenbosch       | 24/08/2022      | BA (Law) | 2022     | Semester | 26/06/2023            | bug test  | default stage |                        |                        | Default stage |

## Program code column added on the statement of account screen

- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- Core ERP > Fee & Payments > Dashboard and Reports > Statement of Account grid **Program Code** column has been added..
- This column have been applicable for both Applicant and student.
- Datagrid functionality applicable on it.

# Setup

## Enhancement

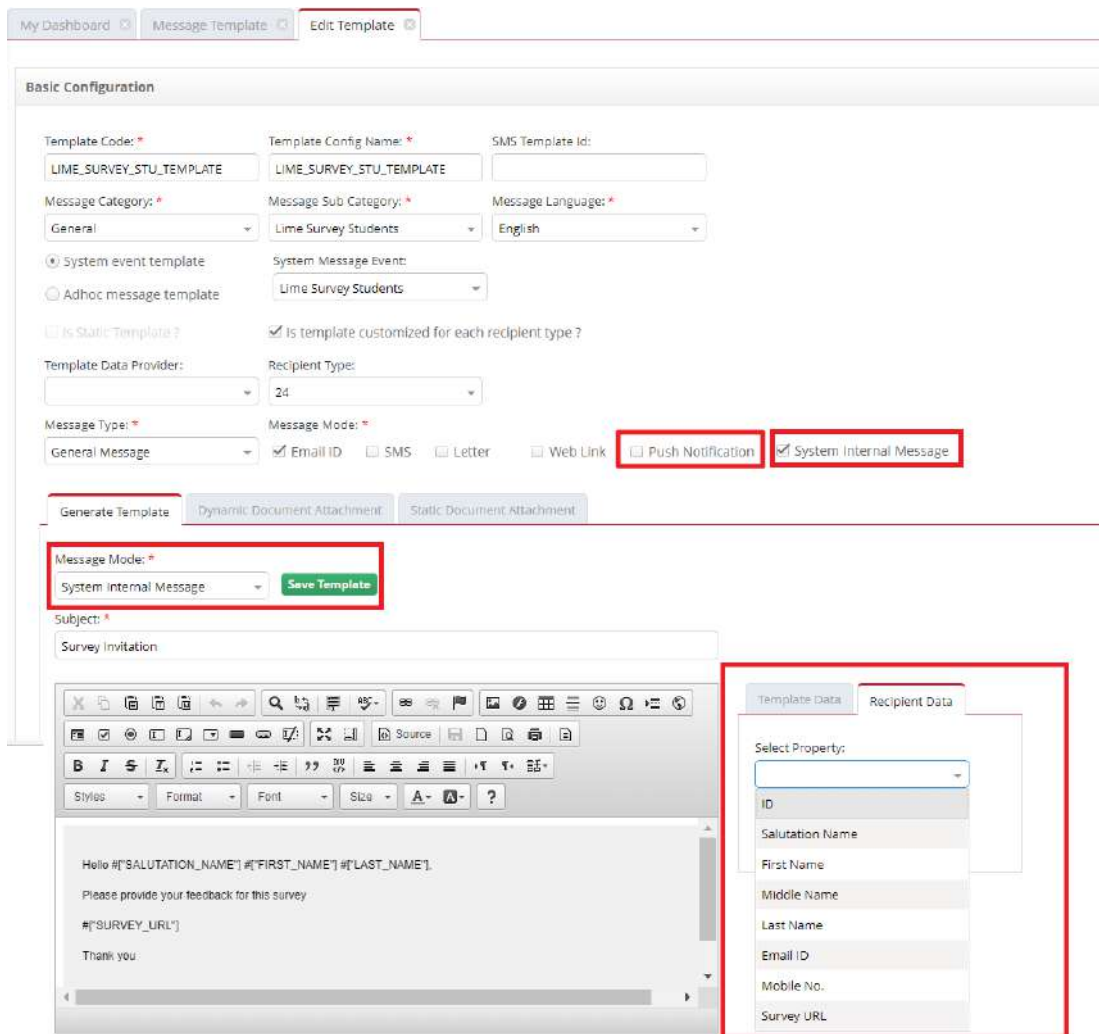
### Dynamic QR Codes for Document Templates (R&D)

- This is an enhancement found **FEASIBLE in already existing Functionality** applicable to **University/ College/ School** after the feasibility study.
- A data provider can be added in the document template through which we can add QR code (dynamically generated) on the document template.
- The Generated QR Code would be unique for every student.
- The QR code would have parameters which could be set according to the user to generate the QR code on the real-time basis on the UI.

### "Push Notification" and "System Internal Notification" configured for "Lime survey"

- This is an enhancement **in already existing Functionality** applicable to **University/ College/ School**.
- Setup > Message Template– "System Internal Message" and "Push Notification" options have been added for the system message template "LIME\_SURVEY\_STU\_TEMPLATE".





## System Message Event scope enhanced

- This is an enhancement **in already existing Functionality** applicable to **University/ College/ School**.
- Setup > System message event – The two system message events "Service Request Student Creation" and "Service Request Assignee Creation" were working for only student general and transfer request flow. NOW, BOTH these system message events will work for the following service requests raised:
  - **Programs and Courses Module** – Certificate Request (Courses and programs).
- This enhancement has its impact on Student Portal and Core ERP Portal.

## Termination request related enhancement

- This is an enhancement **in already existing Functionality** applicable to **University/ College/ School**.
- **Setup** > Service Request Settings > Termination Request > Edit Request screen – An optional checkbox field "Auto Follow-up" has been added on the screen to skip the follow up process for the termination request raised.
- It is managed by Translation settings.

**Edit Request**

Request Category:  
Termination Request

**Request Details**

SLA-in days: \* 15 Followup Status: \* In-progress test Complete

Documents Applicable

Fee Applicable

Auto Follow-up test

**Assignee/Approver Details**

Auto Approve

| Program Group        | Default Assignee | Default Approver    |
|----------------------|------------------|---------------------|
| Program Group_test 6 |                  |                     |
| Diploma              | EMP14 / testing  | EMP19 / harshq test |

- **Student** > Student Request – Three New buttons viz. “Approve”, “Reject” and “More Actions(Close option as on date)” have been added on the screen to help the assignee work upon the assigned request. These buttons work on the basis of the request status, i.e. if the request status is “Approved” or “Rejected” the approve and Reject buttons will be disabled.
- It is managed by Translation settings. DFR Settings are applicable.
- **Student** > Student Request – A new checkbox “Auto Follow-up” has been added to filter out all the requests for which “Auto Follow-up” is configured during the setup.

My Dashboard Service Request Settings Students List Student Termination Student Request 771 662 Student Transfer Report 853

Search Advanced Search

Request Category:  Auto Follow-up

Beyond SLA: From Date: To Date:

**All Request**

| Request ID                              | Request Name           | Request Category | Request Type          | Request Date | Request Assigned To | SLA Days | Service Request Status |
|---|------------------------|------------------|-----------------------|--------------|---------------------|----------|------------------------|
| 853                                     | Academic Administrator | Transfer         | Program transfer      | 11/04/2023   | AMAR                | 2        | APPROVED               |
| 801                                     | Academic Administrator | Transfer         | Withdraw from program | 23/02/2023   | AMAR                | 5        | SUBMITTED              |
| <input checked="" type="checkbox"/> 771 | Academic Administrator | Transfer         | Program transfer      | 09/02/2023   | AMAR                | 2        | Rejected               |

**Close Request**

Request Executed on:

Closure Reason: \*

Closure Remarks:

## System message event trigger for Publish Grade book

- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- A new system message event and template for the Students and parents, when the User clicks on "Generate and Publish Grade book" through core ERP has been created. Following are the Scenarios in which the system message event will trigger.
  - **Core ERP** > Examinations module -> Student Assessment Report -Export Grade Book - Generate and Publish or Publish button.

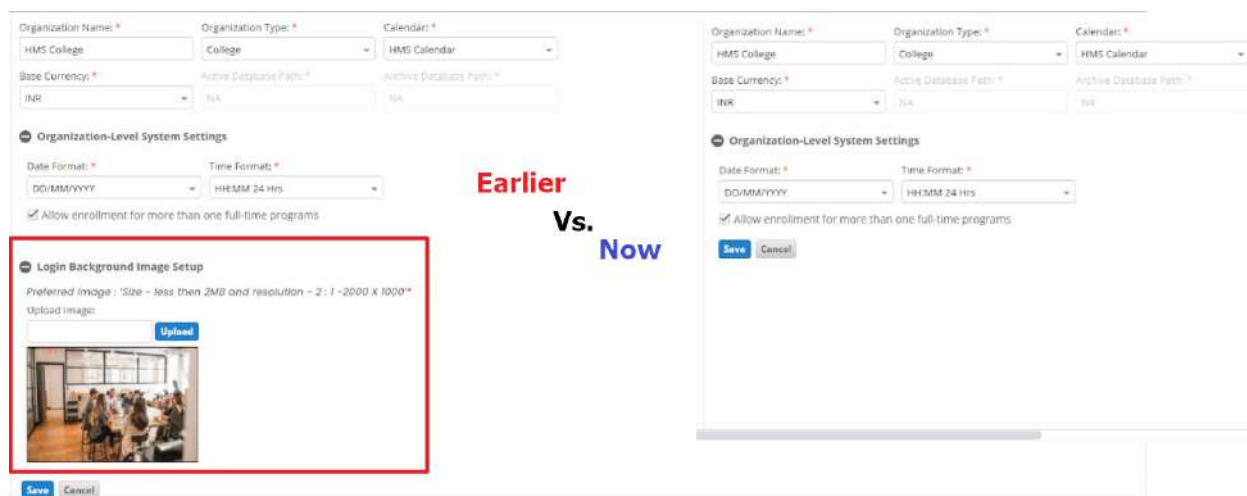
- **Employee Portal** > Student Assessment Report -Export Grade Book - Generate and Publish or Publish button.
- Two new Message Events- “Publish Grade Book for students” and “Publish Grade Book for Parents” have been created to trigger the message.
- Two new Message Templates - “Publish Grade Book for students” and “Publish Grade Book for Parents” have been created.
- Message category is “Publish Grade Book for students”. and the Message Subcategory is “Publish Grade Book for students”. Similarly for parents, the Message category is “Publish Grade Book for Parents”. and the Message Subcategory is “Publish Grade Book for Parents”.
- Notification will go to the student/parents when the Grade book is published.
- Configuration Level is **Organization Level**.
- Message Type: Notification and Message Mode: Email, SMS, System Internal Notification

## UI/UX Enhancements

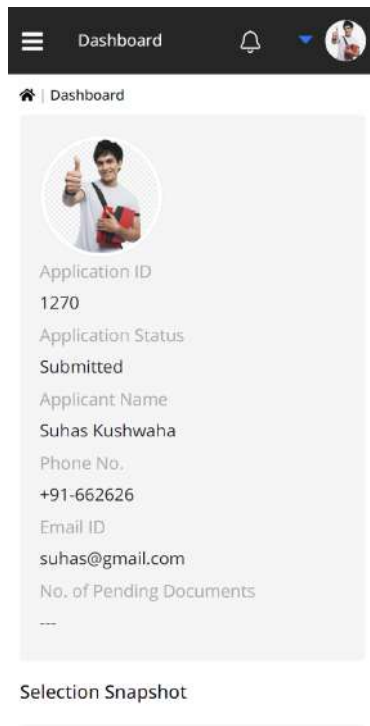
### Enhancement

#### UI/UX changes for various Academia screens

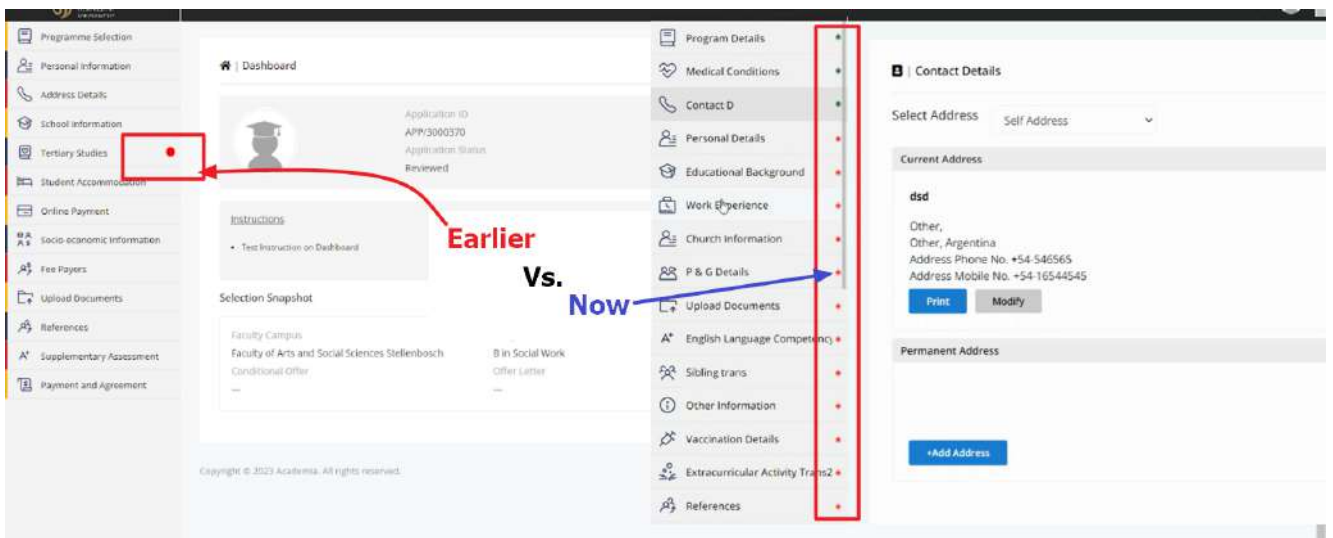
- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- Following changes have been made in the UI/UX design in order to make it more user friendly and more presentable:
  - To Remove Login Background functionality – Setup> Organization Structure> Organisation> Login Background Image setup has been removed now.



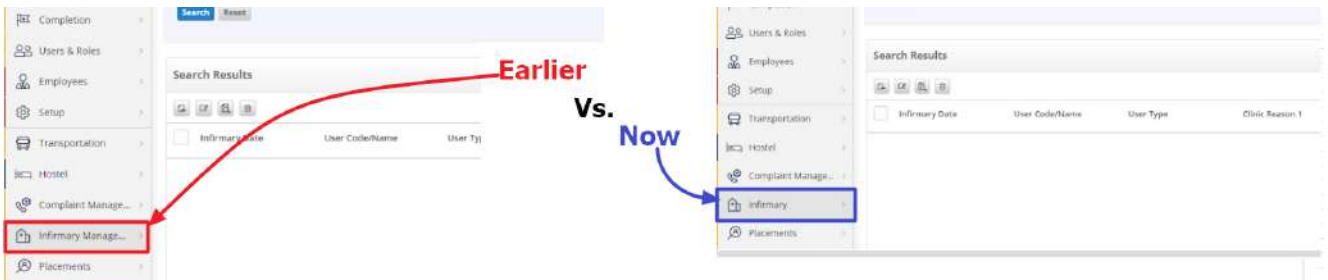
- Module name will now be visible On the angular portal



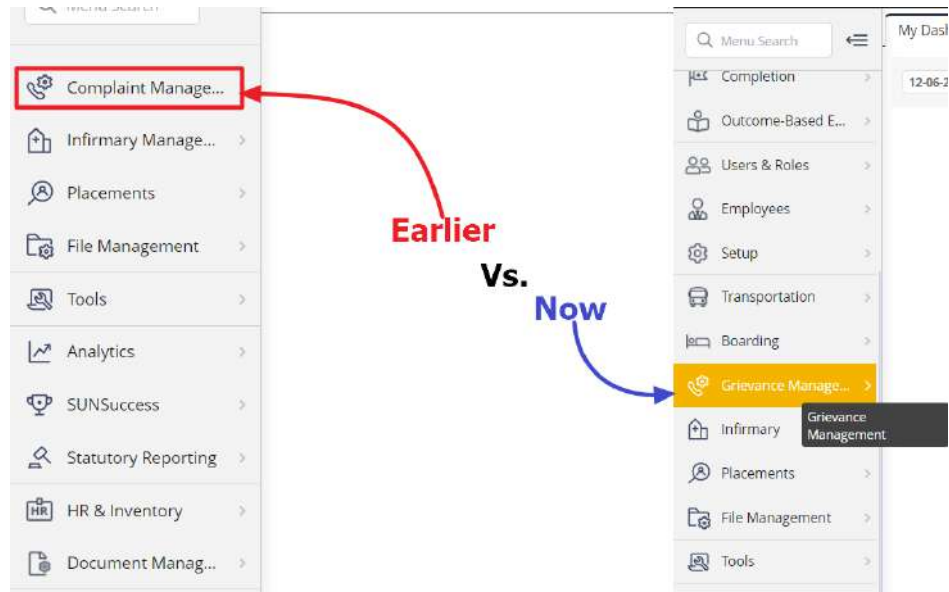
- Asterisk in place of Red Dot on the Angular Portal – Angular Portal(Applicant) > Main menu record – In front of main menu records, in place of Red Dot, asterisk will be shown



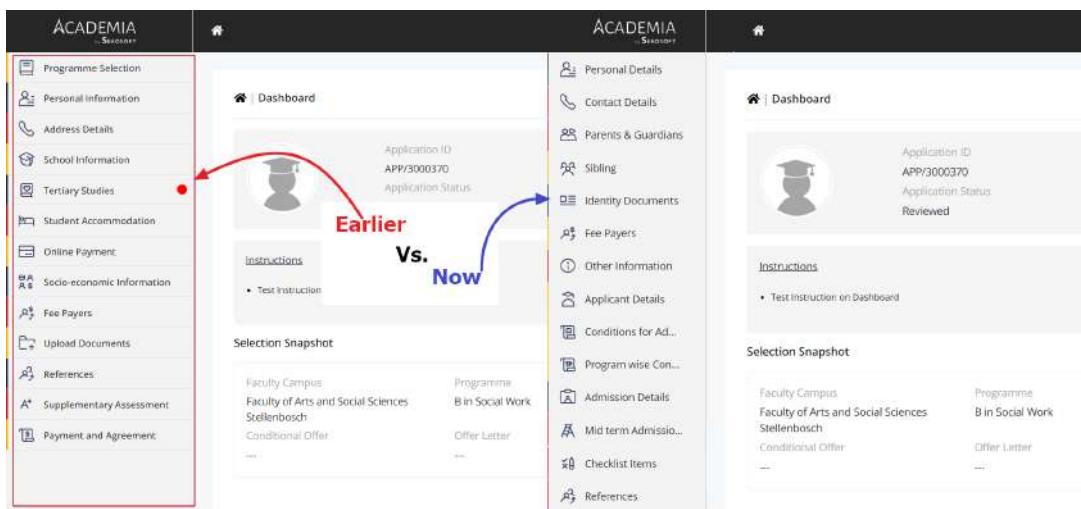
- “Infirmary Management” gets replaced with “Infirmary”



- “Complaint Management” gets replaced with “Grievance”

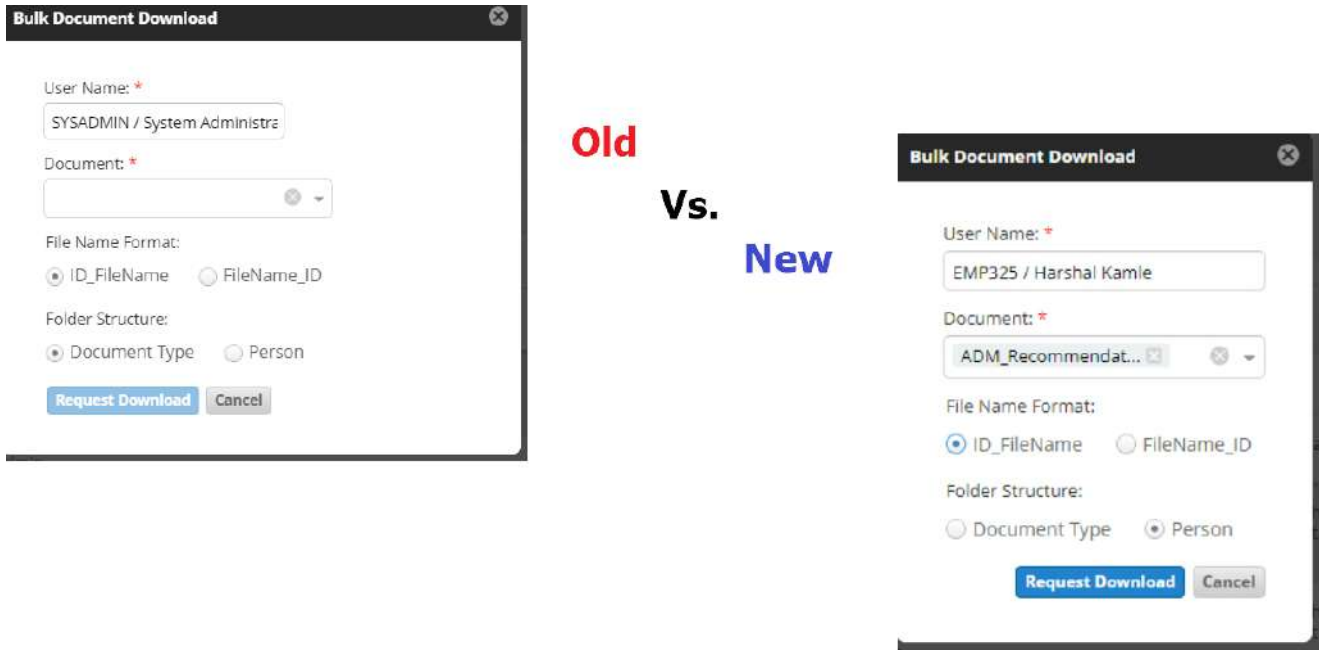


- Angular Portal to appear exactly like Core ERP Portal



## Alignment changes for “Bulk Document Downloads”

- This is an enhancement **in already existing Functionality** applicable to **University/ College/ School**.
- Core ERP> Employee module>Employee List>More Action> “Bulk Document download” popup – The pop-up “Bulk Document Download” is NOW aligned with “center alignment”.



## Alignment changes for “Document Details”

- This is an enhancement **in already existing Functionality** applicable to **University/ College/ School**.
- Core ERP> Employee profile>Document History>Online Documents>'Document details' popup – In the pop-up 'Document details' the 'old' display has to be changed to 'new' display as shown in screenshot.(The extra space has been managed).

Old

Vs.

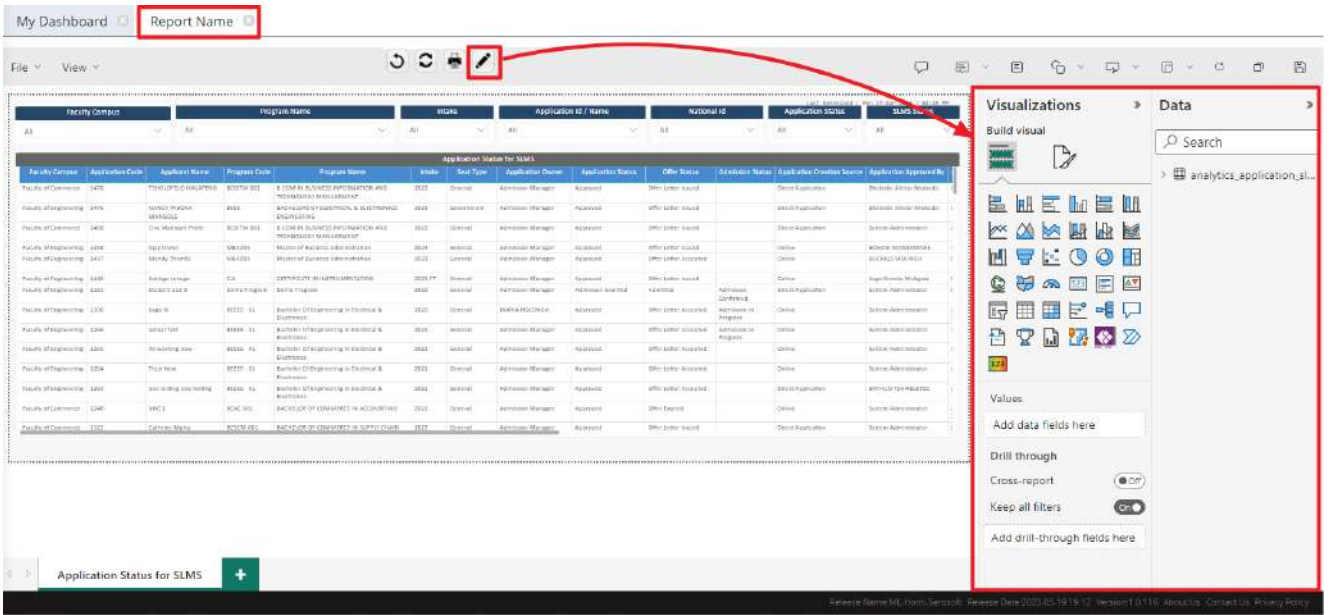
New

## Analytics

### Enhancement

#### Edit button for Analytics Reports

- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- A NEW **Edit** button has been added on the Analytics Report. This button is permission control.
- Clicking on the “Edit” button on any analytics report the user can see the functionality of PowerBI Panes like “Data Pane”, “Visualization Pane”.
- With the help of these panes, the user can customize the Analytics reports.

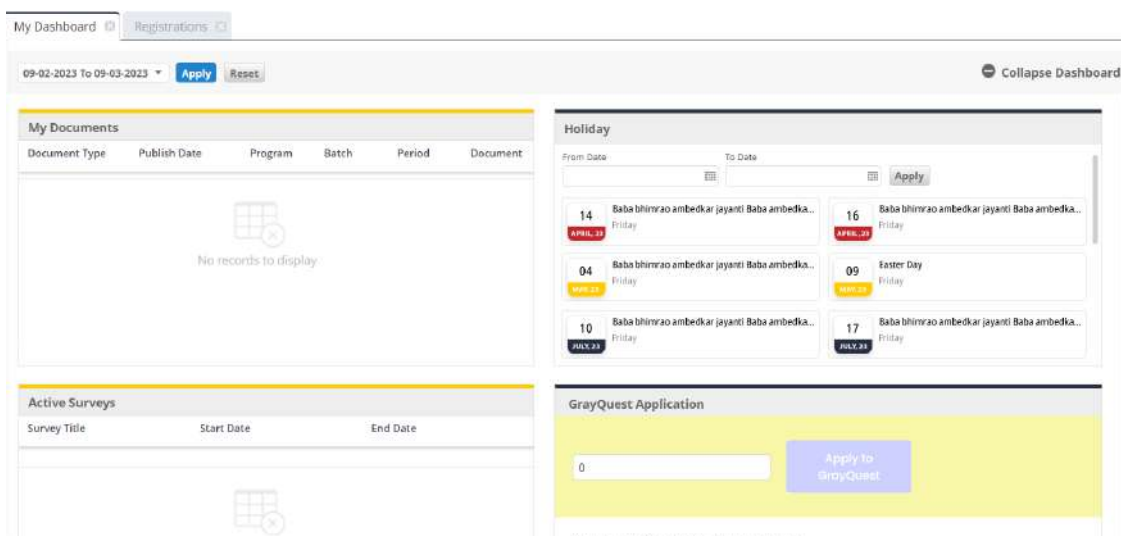


## Student/Parent Portal

### Enhancement

#### Holiday details Dashlet

- This is an enhancement in already existing Functionality applicable to University/ College/ School.
- A new dashlet has been deployed on the student and parent portal named "holidays" to show the list of holidays that fall under the current period and the date range would also come from the current period and the calendar mapped with that Batch.
- An editable Date range filter is available on the dashlet to assist the user change the date range according to the requirement.
- This is controlled by the “role dashlet mapping” feature.





# Dashboard

## Enhancement

### Improvement in Student Information Dashboard

- This is an enhancement in **already existing Functionality** applicable to **University/ College/ School**.
- Core ERP> My Dashboard> Student Information Dashlet – This Dashlet NOW allows searching for the students even when one of the important IDs, i.e. Student ID or Admission ID is “Inactive”. Right now, The name appears in the search box but the record opens with a “Null” student ID, and all other records as empty.
- All records irrespective of student ID status and Admission ID status are searchable and displayed in the format: **StudentID/Student Name/Admission ID**
- On typing any one of parameters or combination of parameters the record details will be displayed.

The screenshot displays the 'Student Information' dashboard. At the top, there is a search bar labeled 'Search for Student:' with the text 'ankit' entered. Below the search bar, a dropdown menu shows search results in the format 'StudentID / Student Name / Admission ID'. The first result is 'SD10076809 / Ankit Agrawal / AD10225004', which is highlighted. Below the search results, the details for the selected student are shown. On the left, there is a profile card for 'Ankit Agrawal' with a phone number '+27-454545454' and an email address 'SD10076809@connect.edu.za'. On the right, there is a table of details:

|                |            |
|----------------|------------|
| Student ID -   | SD10076809 |
| Admission ID - | AD10225004 |
| Grade -        | Grade 0    |
| Intake -       | 2023       |
| Period -       | 2023       |
| Class -        | Grade 0C   |

Below the student details, there is a section titled 'Brand Campus Enrolment Summary' with a table of columns: Brand Campus, Intake Year, Actual Data-in minutes, Target, Variance, Manned Capacity, and Building Capacity.

# ACADEMIA

Release Notes - Mobile  
**Build Name: Kalam**

Mayank S. Karkare  
Ashutosh Sharma  
Arun Ghuraiya  
22 May, 2023

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## Version

| Date Changed | Descriptions of Change(s) | Responsible Person                                |
|--------------|---------------------------|---|
| 22/05/2023   | Initial Draft             | Mayank S. Karkare, Ashutosh Sharma, Arun Ghuraiya |

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## Overview

### Introduction

Serosoft Solutions is glad to announce the release of the latest version of our flagship product Academia V2. The new release is coined as **Kalam**. This document is intended to share information and only information about the features and functionality introduced with the application's new release. Also, this document includes the known issues and bugs which are being evolved steadily with new development cycles.

### About Release

**Kalam** is a major release for all the clients which introduces major features & new functionality to Academia Application. It also includes various reports & Excel loaders which are critical for clients. This update enhances various processes across the application. **Kalam** also caters to some major business cases incorporated for global customers. This release also improves the flow of major modules.

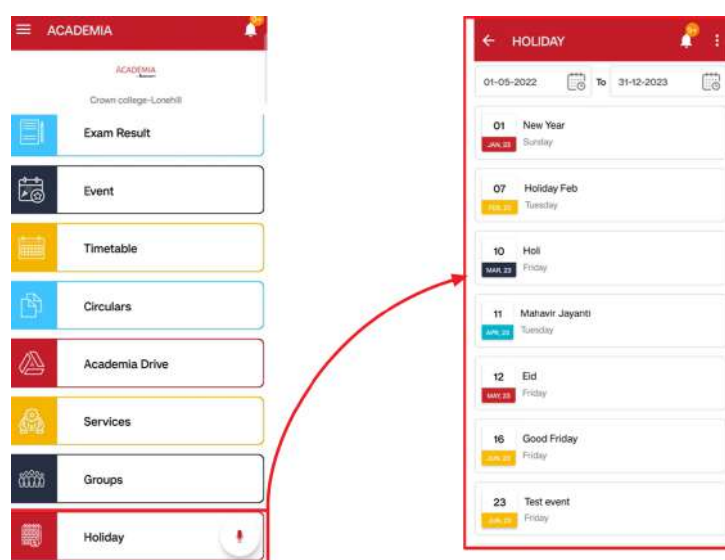


# Mobile App

## What's New

### Calendar Holiday Details Module Added

- This is a **Newly developed feature created** applicable to University/ College/ School.
- A **NEW** module **"Holiday"** has been added on the mobile application to display the Holiday details as mentioned in the Academic Calendar of the Academy Location. This will be visible to students as well as parents. The default list displayed will include the holidays from the current period



## Enhancement

### Translation settings made applicable

- This is an enhancement **in already existing Functionality** applicable to **University/ College/ School**.
- Translation settings have been made applicable on the following screens/messages displayed on the Students' Mobile App in case of **"Blank Screens"**:
  - Fee Payer Details- Fee Payer Details are not available at the moment.
  - Medical Conditions- Medical Conditions are not available at the moment.
  - Result Report Details- Result Report Details are not available at the moment.
  - Documents -Documents are not available at the moment.
  - Media Files -Media Files are not available at the moment.

- Hyper Links- Hyper Links are not available at the moment.
- Current Communities - Current Communities are not available at the moment.
- Past Communities - Past Communities are not available at the moment.
- Committees -Committees are not available at the moment.
- Academy Locations - Academy Locations are not available at the moment.
- Participants - Participants are not available at the moment.
- Hostel Details - Hostel Details are not available at the moment.
- Current Services - Current Services are not available at the moment.
- Past Services -Past Services are not available at the moment.
- Transport Details- Transport Details are not available at the moment.
- **Personal Data Change Translation** – For following placeholders, translation settings have been made applicable
  - Data to be changed
  - Address Type
  - Geographical Area
  - Primary Email
  - Secondary Email
- **Tap Payment Gateway Translation** – On Payment success, translation settings have been made applicable
  - Payment transaction is complete.
  - Transaction Details
  - Reference Id
  - Payment Date
  - Payment Method
  - Payment Amount
  - Payment Status
  - Make Payment

## Sequencing changes for Bills

- This is an enhancement **in already existing Functionality** applicable to **University/ College/ School**.
- Mobile dashboard > Fees > Invoices screen – By Default, the 'DUE' Radio Button will be selected NOW ensuring that the DUE bills are displayed to the students.
- Apart from that NOW the bills with the “Earliest” Due Date will be displayed on top following the “Older to Newer” ordering sequence.
- Some UI changes have also been incorporated for better appearance.



09.54

Fees

By default like this → **All** Due Paid

**Invoice No. INV/KG/23-24/00311** Fully Pending

Due Date: 30/04/2023  
Invoice Date: 06/04/2023  
Total Amount : Rp 7.945.536.646.921,00  
Balance Amount: Rp 7.945.536.646.921,00

**TR 36PK | W1060 | H1920**

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Online Payment