

# **USER MANUAL**

# **Inter-Year Processing**

**(Document 27e)**

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## 1 Module Overview

### 1.1 Introduction

#### 1.1.1 Objective

The Inter-Year Processing function enables schools to plan and manipulate the school information for transition to a new year.

The use of this module minimizes the workload required for the transition process. Users can initiate Plan New School Year from School Management Module. Once the process is initiated, the system will create a new school year and copy the current school year information to the new school year. Information to be copied includes: school information, assessment profile setup, special education profile setup, award and punishment setup and score input method of HKAT. You will be able to see the newly created year in the selection box of school year and proceed planning for the new school year.

A mechanism is also built in the system for users to reset the process. When this function is initiated, all the planned data in the new school year will be deleted and cannot be recovered.

Migrate to New School Year function will mark the new school year as current school year. Having completed the migration process, the planned school year will be shifted to the current school year.

The suggested Inter-Year Processing period runs from early April to late August in the current year or early September of the next school year. Certainly, users are free to start working on this function at any time that suits your needs.

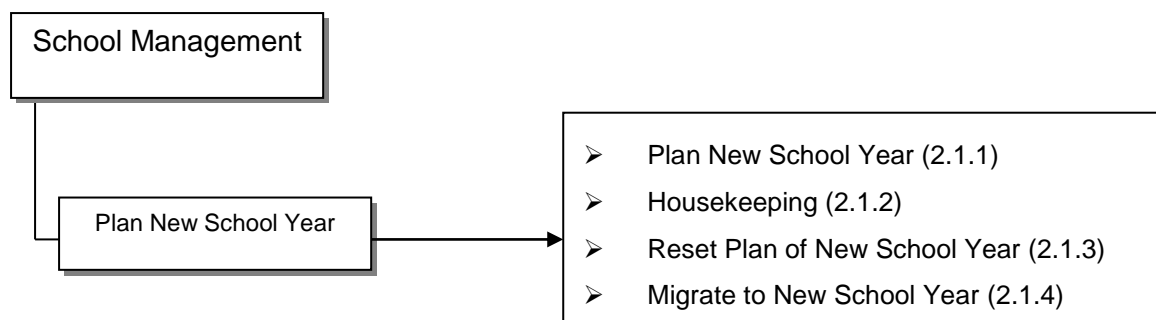
In view of the criticality of this function, no users must log on to WebSAMS during period of Inter-Year Processing. Users are highly recommended to set system access time ([S-SEC01-01] Security > Configuration > System Configuration), which blocks users from logging on WebSAMS before starting the process. If there are other users currently working in WebSAMS, the system will display a list of them when triggering any IYP processes. The current users should inform these users to exit WebSAMS or use a security function to log them out from the system ([S-SEC14-01] Security > Access Control > Login Status).

To communicate more effectively with other WebSAMS users, the current users are recommended to post a note on the announcement board ([S-SCH19-01] School Management > Announcement) to inform users with date / time for IYP.

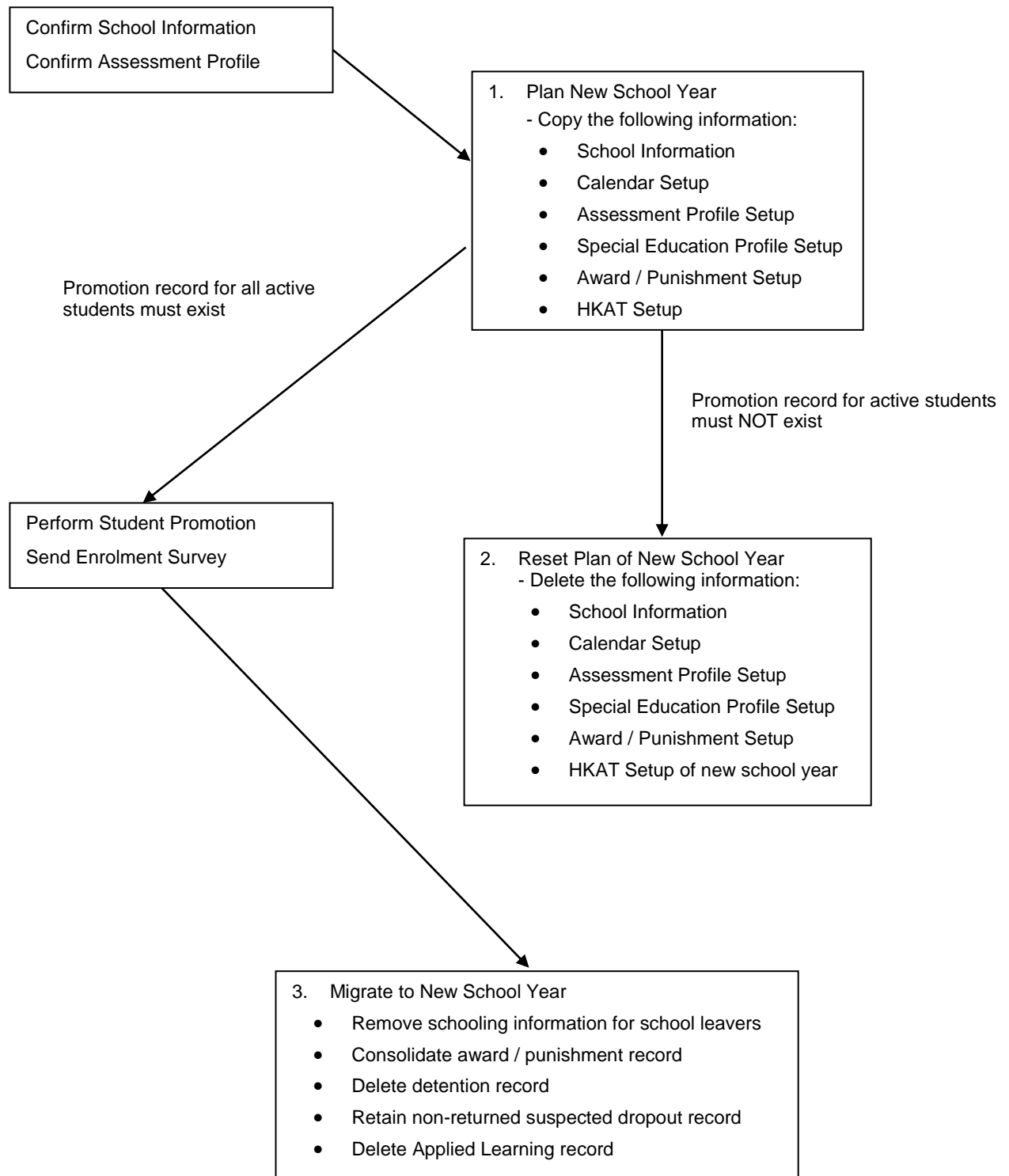
Housekeeping function enables users to remove DQT Package and their corresponding data.

The following sections will further detail the Inter-Year Processing functions and the corresponding procedural guide.

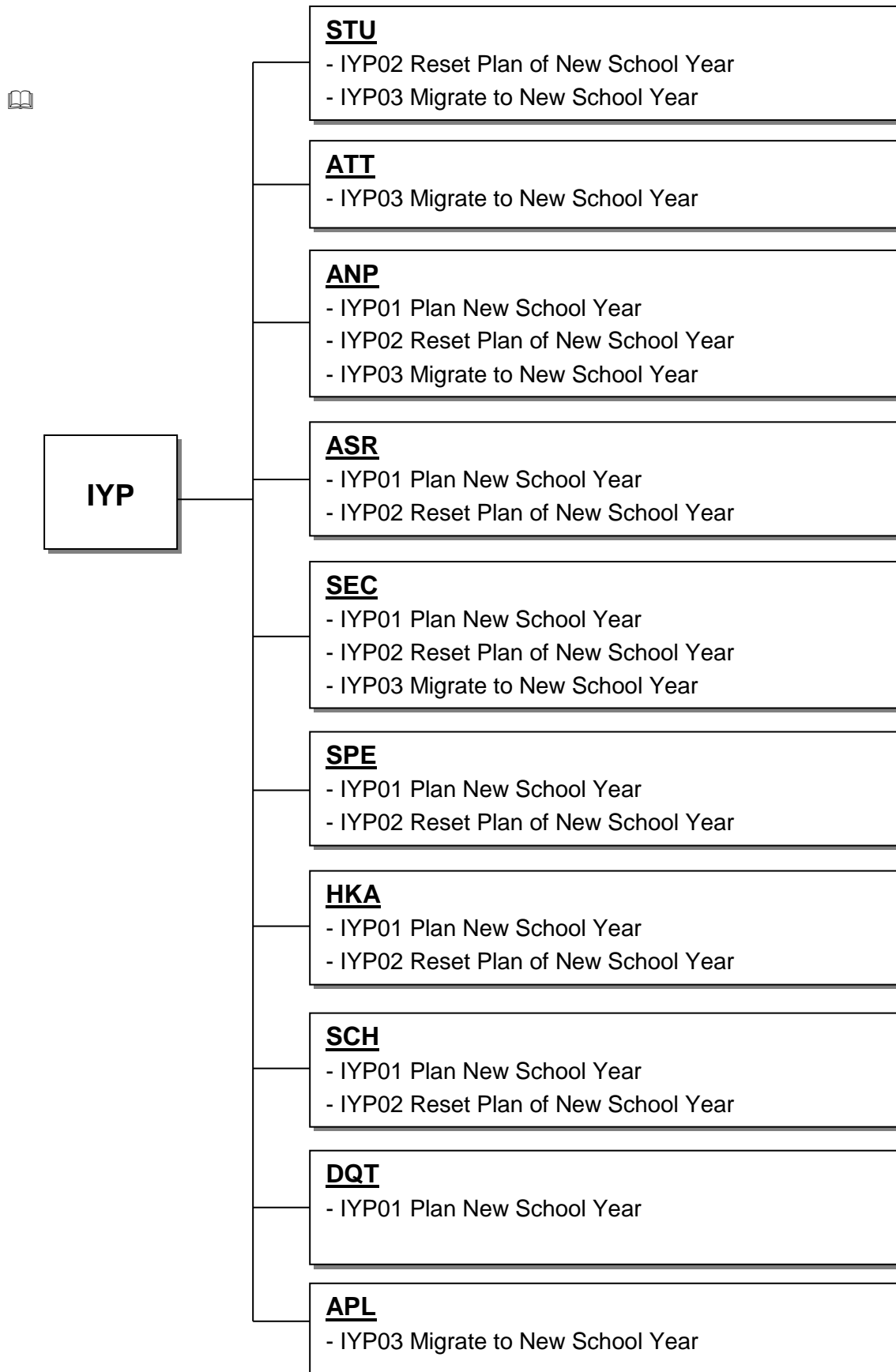
## 1.2 Function Chart



### 1.3 Flow Diagram



1.4 Interactions with other modules



### IYP01 – Plan New School Year

- SCH
  - Check if school information is confirmed
  - Copy current school year information to new school year
- ASR
  - Check if assessment profile is confirmed
  - Copy current school year profile setup to new school year
- SEC
  - Check and display list of logged on users
  - Audit trail is logged
- ANP
  - Copy current school year setup to new school year
- SPE
  - Copy current school year profile setup to new school year
- HKA
  - Copy current school year input score method to new school year
- DQT
  - Housekeeping on DQT packages and their corresponding data



### IYP02 – Reset Plan of New School Year

- SCH
  - Delete new school year information
- ASR
  - Delete new school year profile setup
- SEC
  - Check and display list of logged on users
  - Audit trail is logged
- STU
  - Check if active students have any promotion record for next school year
- ANP
  - Delete new school year setup
- SPE
  - Delete new school year profile setup
- HKA
  - Delete new school year input score method



### IYP03 – Migrate to New School Year

- SCH
  - Check if school term start dates of new school year are completed
- SEC
  - Check and display list of logged on users
  - Audit trail is logged

- STU
  - Check if ALL active students have promotion record for next school year
  - Check if there are some students waiting for sending data files (e.g. a departed student waiting for sending Form A)
  - Check if Form A / As / B / C / D / Ds / E / and Update Student Chinese Name data file has been started preparation.
  - Remove schooling information for school leavers
- ANP
  - Consolidate award or punishment record for current school year
- ATT
  - Delete detention records and data of detention class in current school year
  - Retain non-returned suspected dropout records
- APL
  - Keep up to 4 cohorts of ApL records (include the new cohort to be applied in new school year)



## 2 Operation Procedures

### 2.1 Plan New School Year

#### 2.1.1 Plan New School Year



#### Function Description

Plan New School Year enables users to start inter-year processing. The system will create a new school year, i.e. current year + 1, and copy data from the current school year to the new school year for planning purposes.



#### Pre-requisites

1. School information and assessment profile have to be confirmed before users trigger the process of data capture.
2. No users must log on to WebSAMS.



#### User Procedures

1. Click [**School Management**] → [**Plan New School Year**] on the left menu.
2. Click the **Plan New School Year** tab.

PRIMARY SCHOOL AM User: super1 Login Time: 03/05/2019 10:23 Logout | Help | 中文版本

(RESTRICTED) Current School Year: 2017 3 May 2019 10:45

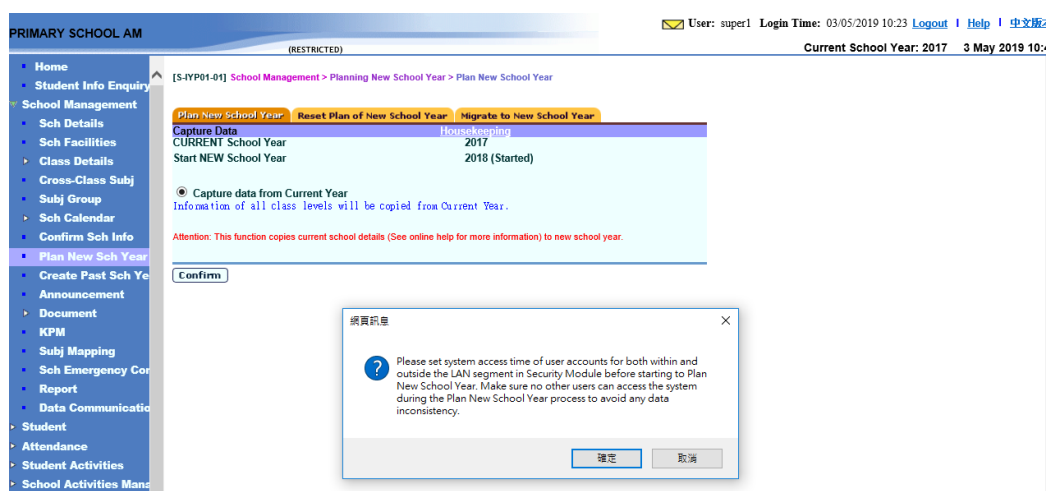
[S-YP01-01] School Management > Planning New School Year > Plan New School Year

Capture Data	Housekeeping
CURRENT School Year	2017
Start NEW School Year	2018 (Started)

Capture data from Current Year  
Information of all class levels will be copied from Current Year.

Attention: This function copies current school details (See online help for more information) to new school year.

3. Click the **[Confirm]** button.



4. Click the **[Confirm]** button to copy information from the current school year to new school year and confirm the operation.



#### Post-effects

1. Users can maintain School Management Information, ASR assessment profile and Student Subject Setup in the respective modules.
2. Users can perform student promotion and admit students to the next school year.
3. Users can even perform the Enrolment Survey on the new school year at the moment that system migration has not been completed.
4. Audit trail is logged.



#### Notes

1. The following information will be captured from relevant module:
  - A. School Information
    - Basic school information
    - Class structure
    - School management committee
    - School facilities
    - Classroom designation
    - Premises
    - Sub-premises
    - Staff entitlement
    - Group for cross-class subject
    - Subject group

- Class basic information
  - Class-based subject
  - Association between class & group for cross-class subject
  - Association between class & subject group
  - Class document category
  - Calendar format
  - School holidays & events
  - Term information
  - Disabled cycle days (for cycle-based system only)
- B. Assessment Profile Setup
- Term and assessment weightings
  - Subject weight and full score
  - Class level assessment profile
  - Assessment Group Setup
  - OM ranking criteria
  - Conduct Setup
  - Other Assessment Setup
  - Code Table Setup
  - Specify current term will be reset to Term 1
- C. Special Education Profile Setup
- Subject Unit Setup
  - Subject Content Setup
- D. Student Award and Punishment Information
- Award and punishment scheme
  - Award and punishment scheme details
  - Award / punishment rule
- E. HKAT Information
- Score input method
2. When users trigger the Plan New School Year, the system will check if data exist in the planning area. If there is any, the system will prompt users' confirmation to overwrite the data set.
  3. If data capture of one of the modules is unsuccessful, data capture process will be aborted. The system will NOT COPY any data.
  4. If students have already been promoted to the new school year, users cannot repeat the step of data capture to the new school year.
  5. If school calendar has not been set up in the current school year, such as missing School Term Start Date / End Date, data capture process will be aborted. The system will NOT COPY any data.

## 2.1.2 Housekeeping



### Function Description

Housekeeping enables users to remove DQT Package and their corresponding data.



### Pre-requisites

NIL



### User Procedures

1. Click **[School Management]** → **[Plan New School Year]** on the left menu.
2. Click the **Plan New School Year** tab.

PRIMARY SCHOOL AM (RESTRICTED) User: super1 Login Time: 03/05/2019 10:31 Logout | Help | 中文版本 Current School Year: 2017 3 May 2019 10:53

[S-YP01-01] School Management > Planning New School Year > Plan New School Year

Plan New School Year Reset Plan of New School Year Migrate to New School Year

Capture Data Housekeeping

CURRENT School Year 2017

Start NEW School Year 2018 (Started)

Capture data from Current Year  
Information of all class levels will be copied from Current Year.

Attention: This function copies current school details (See online help for more information) to new school year.

Confirm

3. Click **Housekeeping** Link

PRIMARY SCHOOL AM (RESTRICTED) User: super1 Login Time: 03/05/2019 10:31 Logout | Help | 中文版本 Current School Year: 2017 3 May 2019 10:53

[S-YP01-04] School Management > Planning New School Year > Plan New School Year

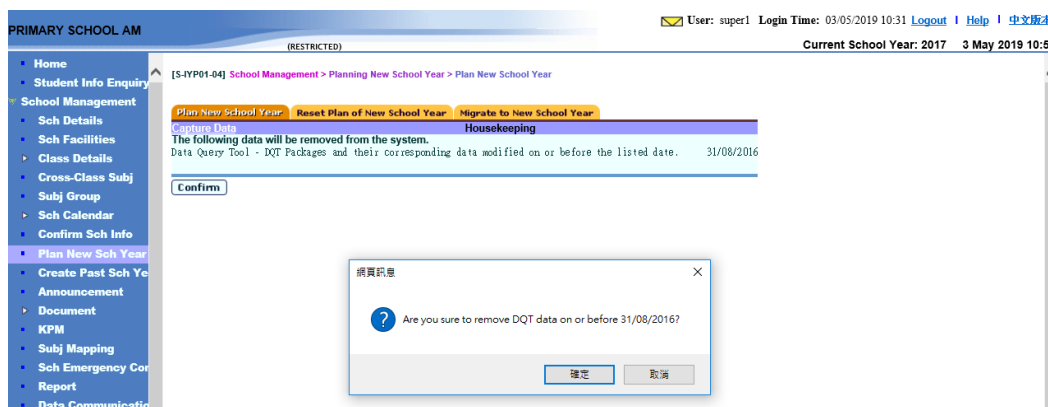
Plan New School Year Reset Plan of New School Year Migrate to New School Year

Capture Data Housekeeping

The following data will be removed from the system.  
Data Query Tool - DQT Packages and their corresponding data modified on or before the listed date. 31/08/2016

Confirm

4. Click [**Confirm**] button.



5. Click [**Confirm**] button to delete DQT data and confirm the operation.

 Post-effects

1. DQT Package and their corresponding data modified on or before school end day of the pervious school year will be removed from the system.

 Notes

N/A

### 2.1.3 Reset Plan of New School Year

#### Function Description

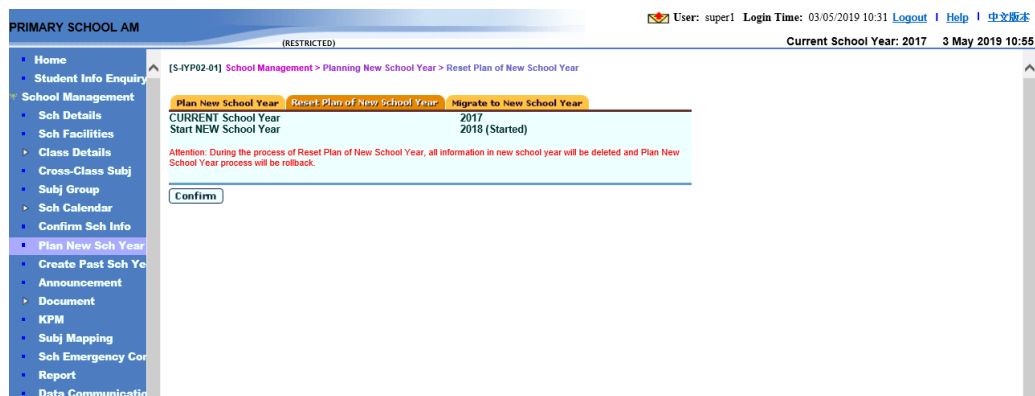
Reset Plan of New School Year enables users to stop the IYP. The system will delete all data in the new school year.

#### Pre-requisites

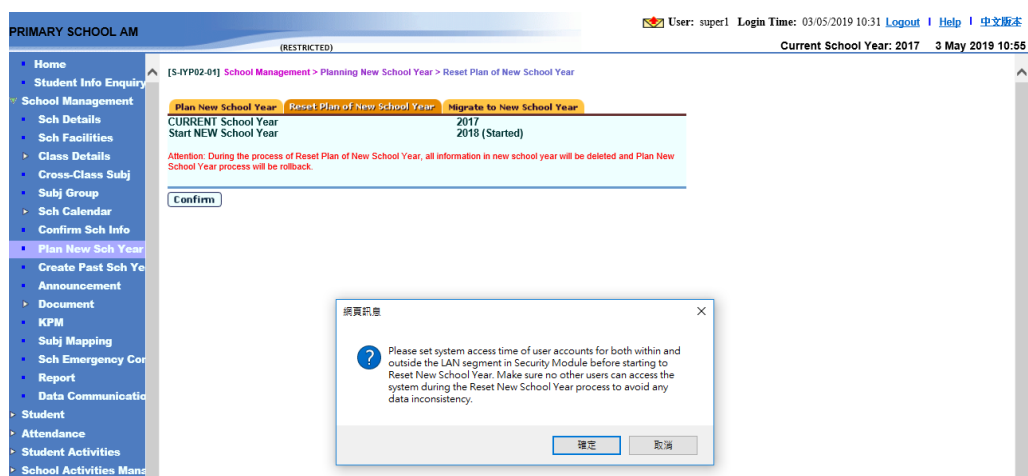
1. IYP data capture process has been confirmed
2. There are no student records in next school year.
3. No users must log on to WebSAMS.

#### User Procedures

1. Click **[School Management]** → **[Plan New School Year]** on the left menu.
2. Click the **Reset Plan of New School Year** tab.



3. Click the **[Confirm]** button.



4. Click the **[Confirm]** button to delete information in new school year and confirm the operation.



## Post-effects

1. All information in the new school year will be deleted.
2. The new school year will no longer be found in the selection box of school year in all modules
3. Audit trail is logged.



## Notes

1. The following information will be deleted:
  - A. School Information
    - Basic school information
    - Class structure
    - School management committee
    - School facilities
    - Classroom designation
    - Premises
    - Sub-premises
    - Staff entitlement
    - Group for cross-class subject
    - Subject group
    - Class basic information
    - Class-based subject
    - Association between class & group for cross-class subject
    - Association between class & subject group
    - Class document category
    - Calendar format
    - School holidays & events
    - Term information
    - Disabled cycle days (for cycle-based system only)
  - B. Assessment Profile Setup
    - Term and assessment weightings
    - Subject weight and full score
    - Class level assessment profile
    - Assessment Group Setup
    - OM ranking criteria
    - Conduct Setup
    - Other Assessment Setup
    - Code Table Setup
    - Specify current term will be reset to Term 1
  - C. Special Education Profile Setup
    - Subject Unit Setup
    - Subject Content Setup
  - D. Student Award and Punishment Information

- Award and punishment scheme
  - Award and punishment scheme details
  - Award / punishment rule
- E. HKAT Information
- Score input method
2. If the promotion records of active students have already been kept in the next school year, the Reset process will be aborted and the system will display an error message. Users have to delete the promotion record in Student Module one by one ([S-STU20-01] Student > Profile > Schooling) or by batch in Assessment Module ([S-ASR27-01] Assessment > Promotion > Reset Promotion).
  3. If there are new admitted students in the next school year, the Reset process will be aborted and the system will display an error message. Users have to delete the new students records in Student Module one by one ([S-STU10-01] Student > Profile > Particulars).



## 2.1.4 Migrate to New School Year

### Function Description

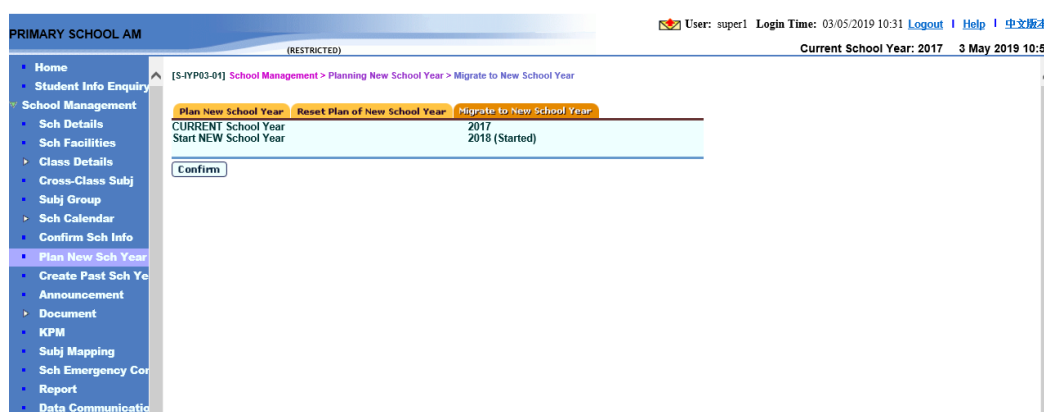
Migrate to New School Year enables users to migrate the system from current school year to new school year.

### Pre-requisites

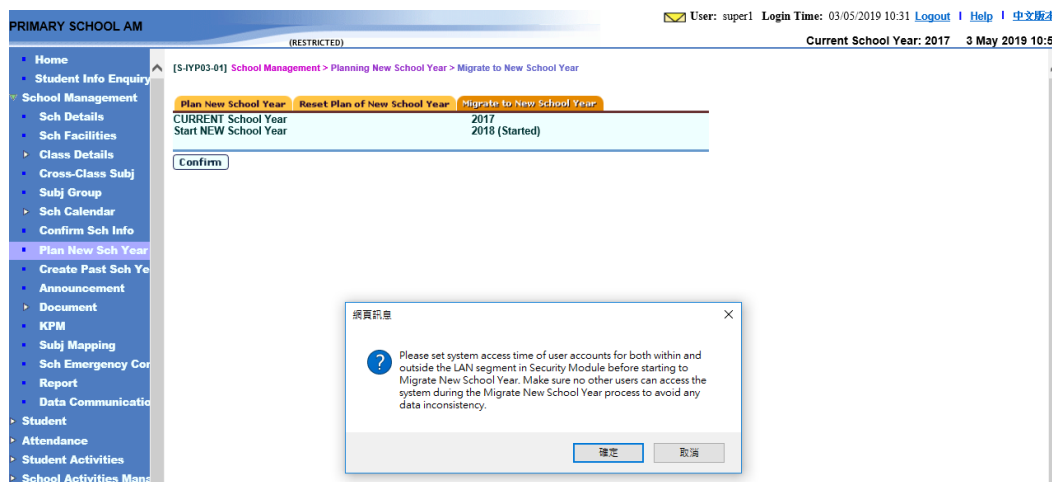
1. All active students have already been assigned with a proper schooling status in the next school year (users may print the report R-ASR059-E/C, "Student without Promotion Status List" for verification).
2. If preparation of Form A / As / B / C / D / Ds / E / and Update Student Chinese Name has started, users cannot proceed with the IYP Ready process. The system will display an error message. Users should go to Student module to either un-prepare the outstanding data files ([S-STU05-01] Student > Data Comm > Generate Data File) or confirm the data file. Then, the users have to go to CDS to send the messages to EDB ([S-CDS01-03] CDS > Outgoing Message). If none of these Forms has been prepared, the system will prompt users with a WARNING message when they confirm to proceed with the IYP Ready process.
3. No users must log on to WebSAMS.

### User Procedures

1. Click [**School Management**] → [**Plan New School Year**] in left menu.
2. Click the **Migrate to New School Year** tab.



3. Click the **[Confirm]** button.



4. Click the **[Confirm]** button to migrate to new school year and confirm the operation.



#### Post-effects

1. The system will roll over from current school year to the school year and the status of IYP will be updated to "Ready".
2. All active student promotion records will be converted to the new school year.
3. If users have not sent the Enrolment Survey in current year and rolled over to new school year:
  - Other Form A / As / B / C / D / Ds of current year cannot be sent.
  - Student records in current year have not been reported to EDB.
  - Users can delete the student records created in current year.
  - Users can modify the STRN for student records created in current year.
4. All expired CDS notifications will be removed.
5. For Applied Learning records, system will process the housekeeping during the migration to new school year and up to 4 cohorts of ApL records will be kept (include the new cohort to be applied in new school year). For example, when current school year is 2011, records before cohorts 2007-09 will all be deleted.
6. Audit trail is logged.



#### Notes

1. Before the system rolls over to the new school year and set the new school year as current school year, the following batch job will be processed.
  - Consolidate award or punishment record for the current school year.
  - Delete detention records and data of detention class in the current school year.

2. If school term start dates of the new school year are not completed, the system will display an error message.
3. When users confirm to roll over to the new school year, the system will check if all active students have schooling records in the new school year. If any active student is found without a schooling record, the system will display an error message and the rollover process will be aborted.
4. If any of the following batch process fails, the system will display an error message and the rollover process will be aborted.
  - Consolidate award or punishment record for the current school year.
  - Delete detention records and data of detention class in the current school year.
5. If there are suspected dropout records of existing students, and if the students departed, please send Form A to EDB. If the students returned, please enter the return date and send Form B to EDB. Otherwise, the suspected dropout record will be retained in the new school year.