INSTITUTE TRANSFER MANUAL FOR ADMIN



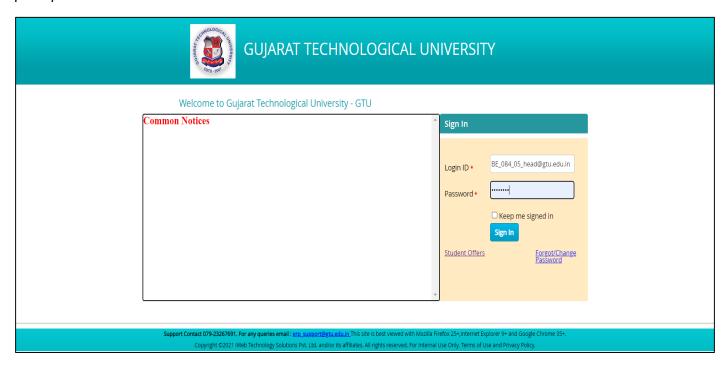
TABLE OF CONTENTS

Case 1: Approval process	3
A. Parent institute Tasklist:	
B. University parent institute Tasklist :	5
C. Receiving institute Tasklist:	6
D. University receiving institute Tasklist :	7
Case 2: Reject approval process	8
Case 3. Forward/Revert process:	9
E. Confirm Institute Transfer:	10
Institute Transfer report	13

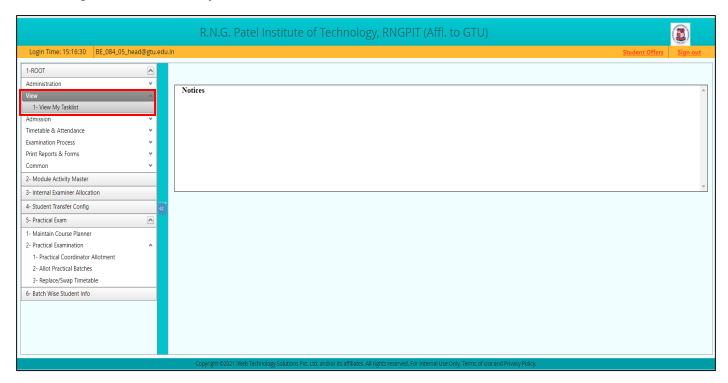
Case 1: Approval process

A. Parent institute Tasklist:

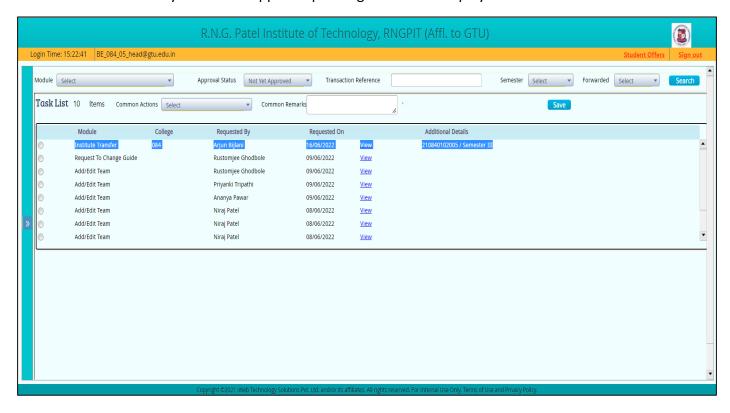
1. Once student paid the institute transfer fees, the record first will go for approval to Parent institute's principal tasklist.



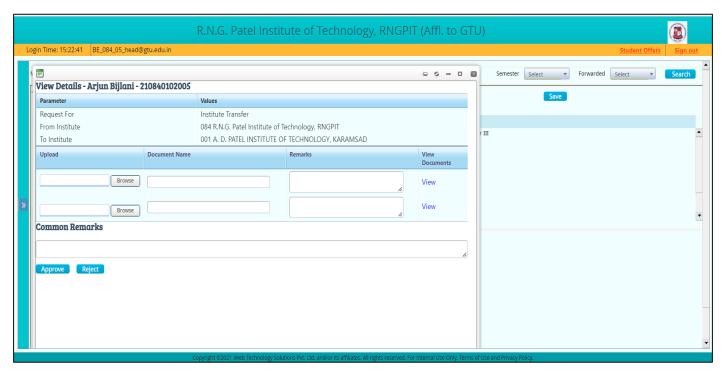
2. After login, Click in View My Tasklist menu.



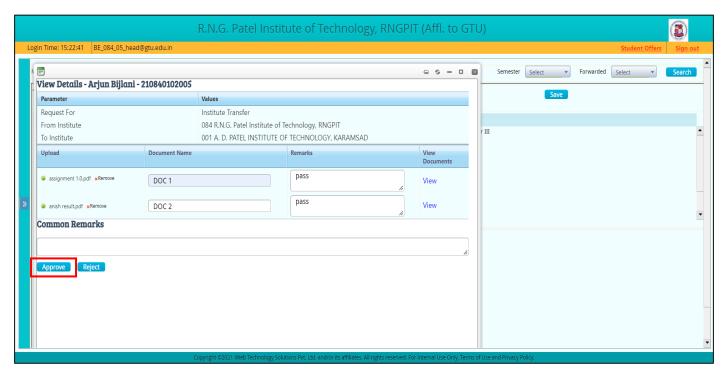
3. After click on View My Tasklist all approval pending record will display as shown below.



4. Click in **View** hypelink to view student details as shown below.



- 5. Upload the required document & enter document name. (Parent institute's principal can see two document upload option)
- 6. Click on Approve button.

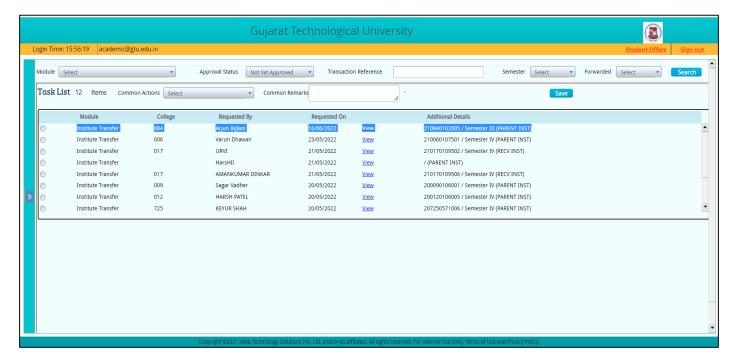


- 7. On click on Approve button 'Task Details Save Successfully message will display on screen.
- 8. Once parent institute approve the record, it will go to university parent institute for approval. In student portal document status become

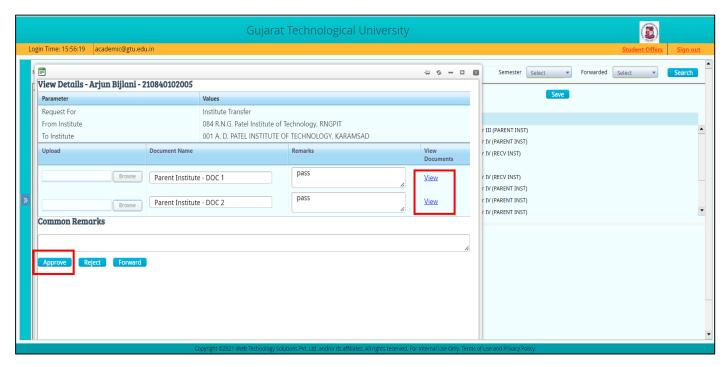
Parent institute --Sent to university & University Parent institute—Pending same will reflect in Institute Transfer report.

B. University parent institute Tasklist:

1. Once parent institute approves the record it will reflect here.



- 2. Click on View hyperlink then below screen will display.
- 3. Uploaded document by the parent institute will display here . Verify the documents by viewing document link & click on **Approve** button

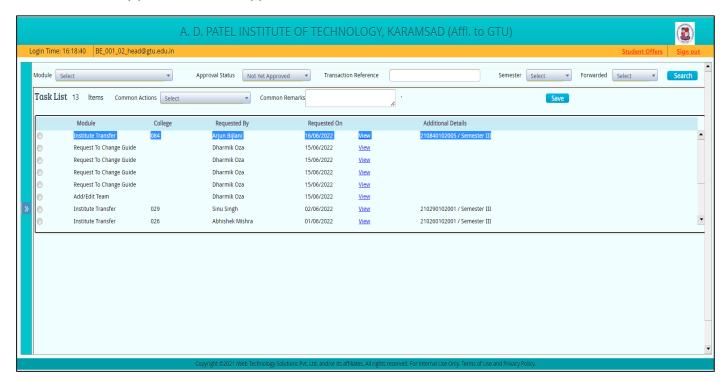


- 4. On click on Approve button 'Task Details Save Successfully message will display on screen.
- 5. Once University parent institute approve the record, it will go to Receiving institute principal's for approval. In student portal document status become

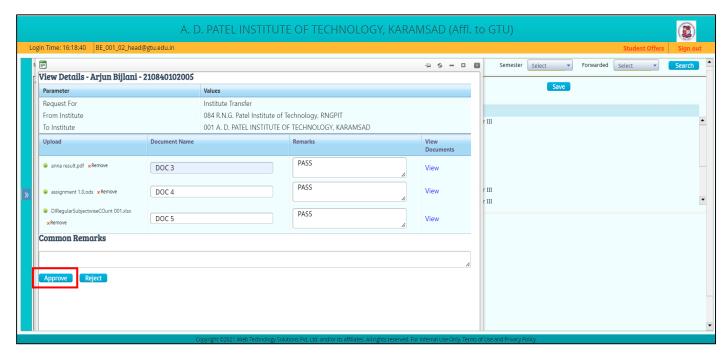
Parent institute — **Approved** & University Parent institute — **Approved** same will reflect in **Institute Transfer** report.

C. Receiving institute Tasklist:

1. Once University parent institute approves the record it will reflect here.



- 2. Click in **View** hypelink to view student details as shown below.
- 3. Upload the required document & enter document name. (Receiving institute's principal can see three document upload option)
- 4. Click on Approve button.

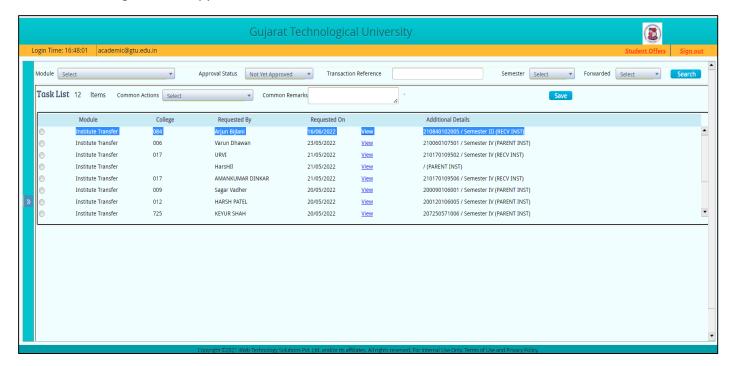


- 5. On click on Approve button 'Task Details Save Successfully message will display on screen.
- 6. Once receiving institute approve the record, it will go to university receiving institute for approval. In student portal document status become

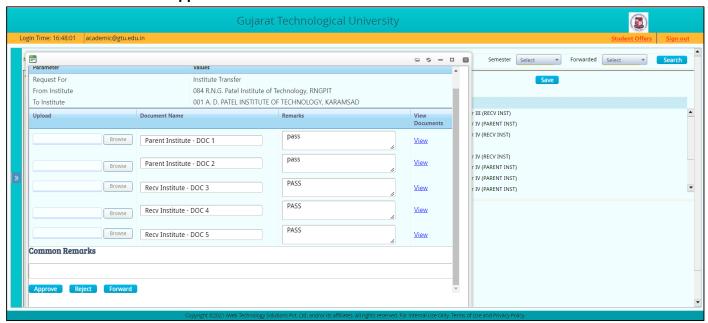
Receiving institute --Sent to university & University receiving institute—Pending same will reflect in Institute Transfer report.

D. University receiving institute Tasklist:

1. Once receiving institute approves the record it will reflect here.



- 2. Click on View hyperlink then below screen will display.
- 3. Uploaded document by the parent/receiving institute will display here . Verify the documents by viewing document link & click on **Approve** button

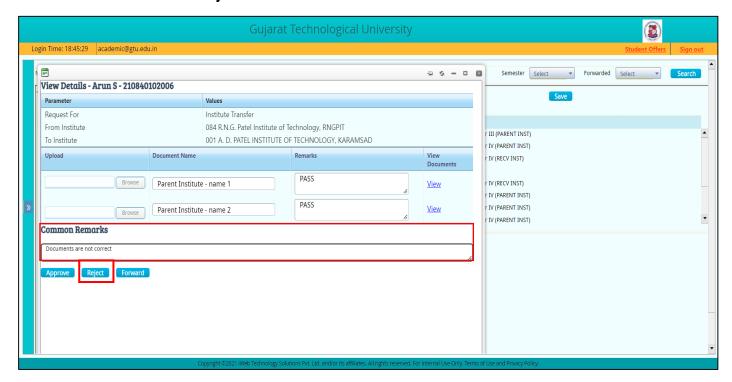


- 4. On click on Approve button 'Task Details Save Successfully message will display on screen.
- 5. Once University receiving institute approve the record, it will go for final approval to the univesity login which done from 'Confirm Institute Transfer' screen. In student portal document status become Receiving institute –Approved & University Receiving institute—Approved same will reflect in Institute Transfer report.

Case 2: Reject approval process

If the parent/receiving institute approves the record but parent/receiving university can 'Reject' the record for some reason

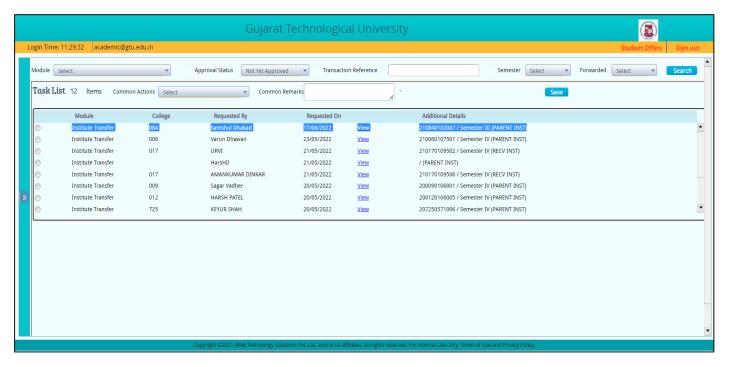
1. Enter Remarks & click on Reject button as shown below.



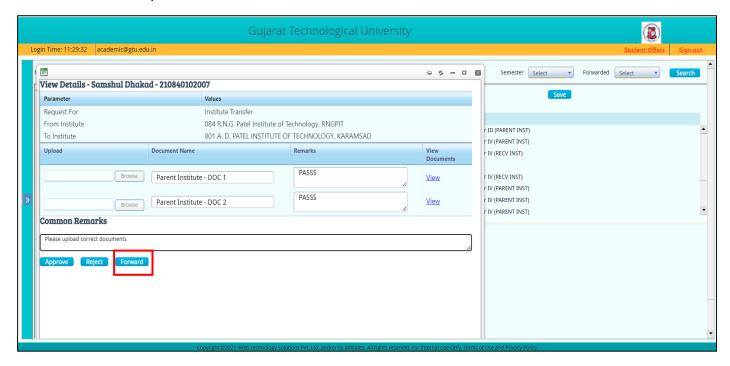
- 2. On click on **Reject** button 'Task Details Save Successfully message will display on screen.
- 3. Once university reject the record, it wont go to next approval person. In student portal document status become Parent/Receiving institute --Sent to university & University institute—Rejected same will reflect in institute transfer report

Case 3. Forward/Revert process:

Approved record by Parent/Receiving institute, the university can forward the record for some reason then again Parent/Receiving institute can correct the record & can revert that record to university.

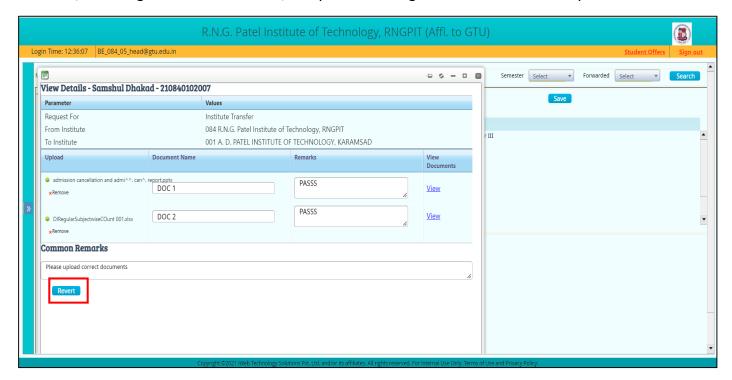


1. Enter remark if any & click on Forward button



4. On click on Forward button 'Task Details Save Successfully message will display on screen.

- 5. Once Parent/Receiving University forward the record, it will go again Parent/ Receiving institute tasklist for approval. In student Portal document status become –Parent/Receiving institute-- **Pending** & University Receiving institute—**Resent** same will reflect in institute transfer report
- 6. Parent/Receiving institute can correct /verify the data & again rever to the university.

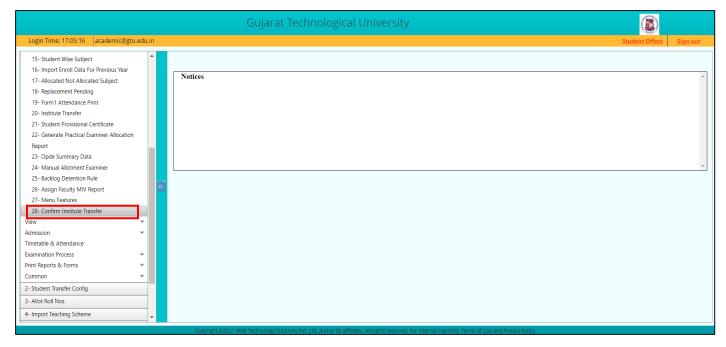


7. Once Parent/Receiving Institute Revert the record, it will go again Parent/ Receiving university tasklist for approval. In student Portal document status become –Parent/Receiving institute-- **Resent** & University Receiving institute—**Pending** same will reflect in institute transfer report.

E. Confirm Institute Transfer:

Purpose: Using this screen, the university can do final approval. Here only that student record will display which is approved by all four authority person.

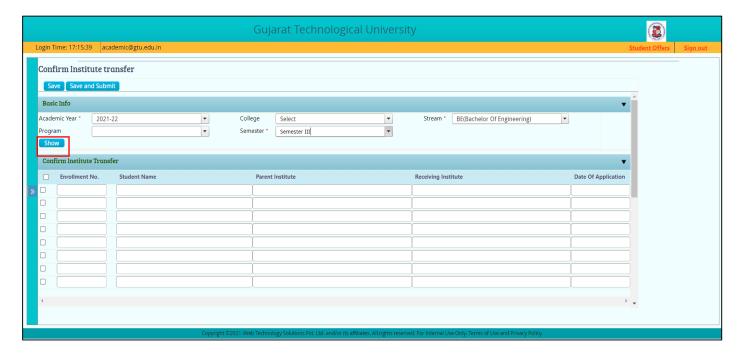
1. Login with university to view Confirm Institute Transfer



2. After clicking on **Confirm Institute Transfer** below screen will display.



- 3. Select Academic Year, Stream & Semester (College & Program is optional)
- 4. Click on **Show** button.



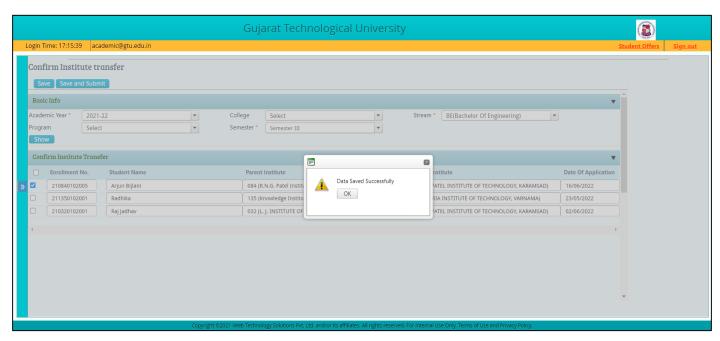
5. When click on **Show** button, below screen will display:



6. Select the student and click on Save button.



7. On click Save button Data Saved Successfully message will display



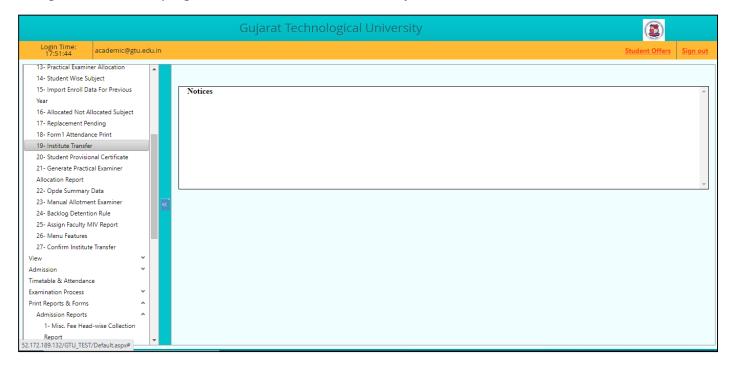
- 8. Click on **Save and submit** for final submission. Once record is submitted the selected student record will get removed from the list.
- 9. Once final approval is done in institute transfer report 'Approved 'status will display in 'Final University Approval' column against this student.

Note: Once all approval process done & when student promoted to next semester then he/she will display in requested institute with new enrolment number.

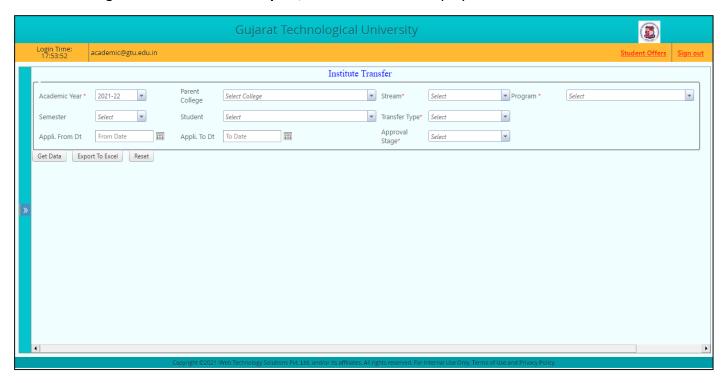
Institute Transfer report

Purpose: Using this screen, as per selected parameters admin can see the student's institute transfer records with their fees & approval status.

1. Login with university login & click on Institute transfer report as shown below

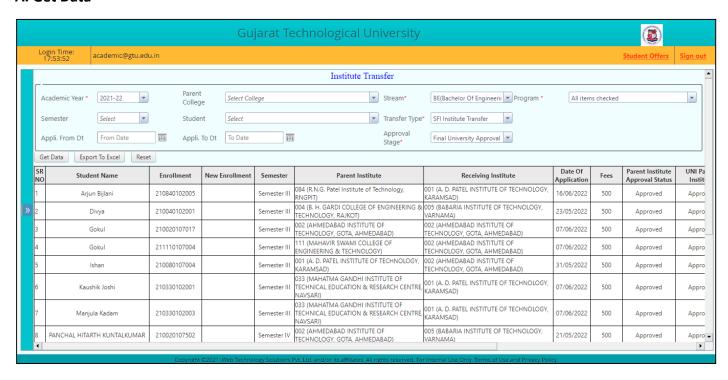


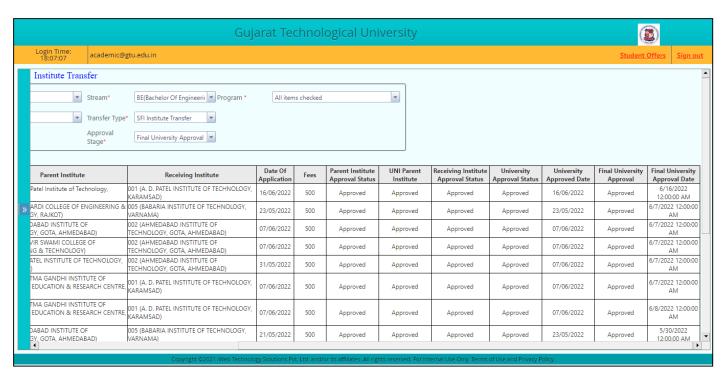
2. After clicking on Institute Transfer report, below screen will display



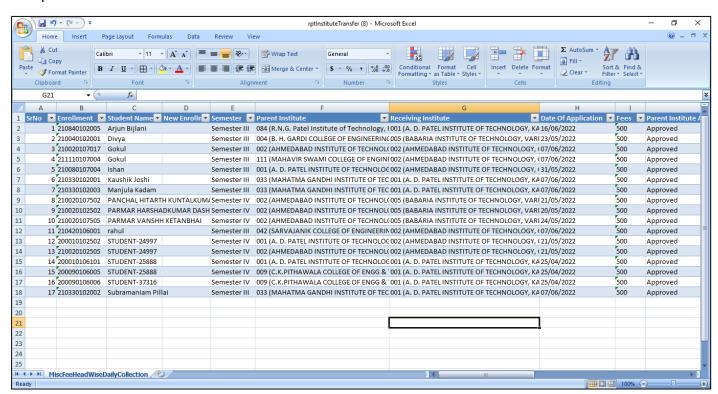
3. Select required parameters & click on **Get data**. Here as per selected Transfer Type i.e SFI Institute Transfer or GOV Institute Transfer & Approval stage wise record will display.

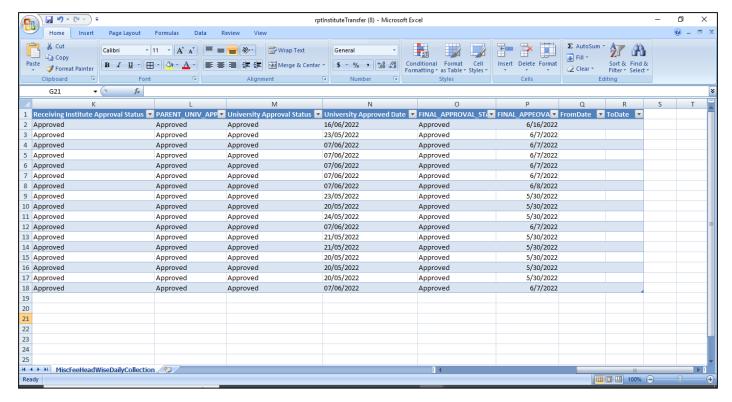
A. Get Data





B. Export To Excel





END MANUAL