



# CloudSAMS USER MANUAL Customization

**(Document 27e)**

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## 1 Module Overview

### 1.1 Introduction

#### 1.1.1 Objective

Customization module consists of four major components – Account Information, Personalization, Change Password and Quick Access.

- a. Account Information allows users to view their own account information.
- b. Personalization allows users to customize their own personal settings.
- c. Change Password enables users to change their own user account passwords after logging into the system.
- d. Quick Access allows users to customize their own quick access preference.

User Menu displays various kinds of information.

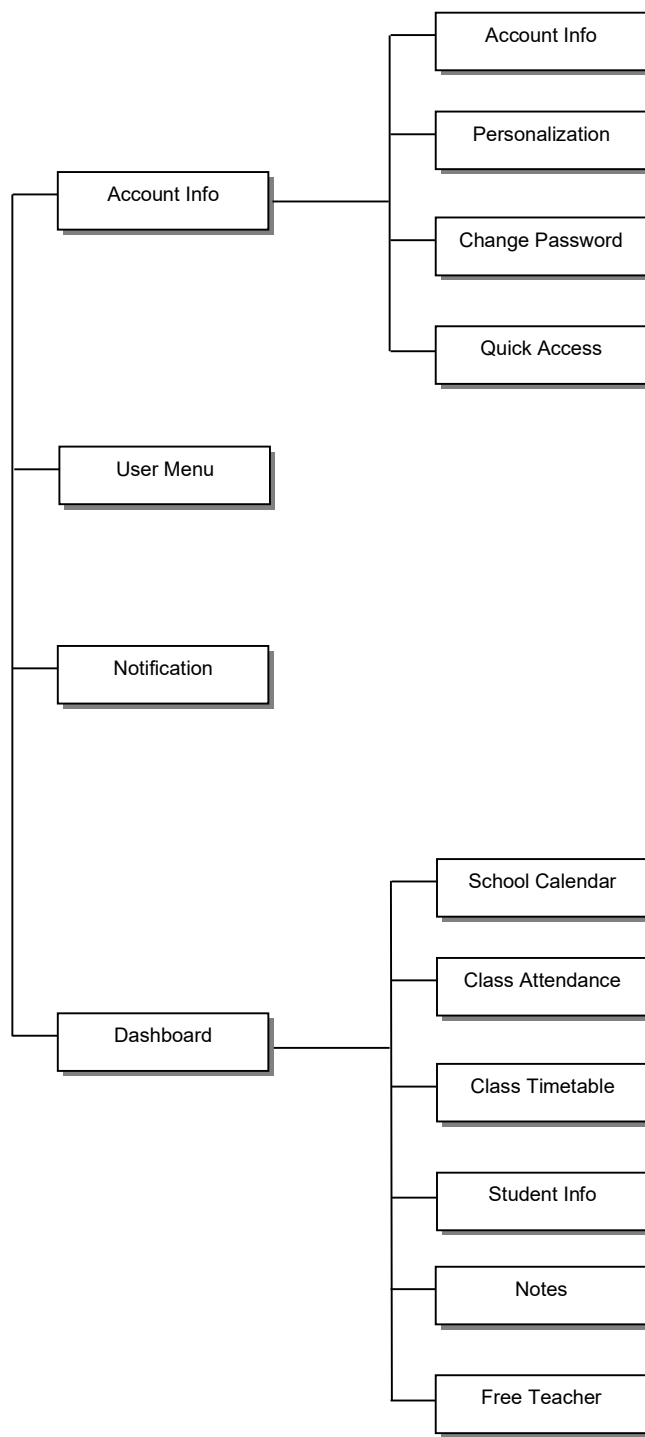
Notification displays various kinds of notifications from across CloudSAMS systems or modules.

Dashboard consists of six widgets – School Calendar, Class Attendance, Class Timetable, Student Info, Notes, Free Teachers.

- a. School Calendar allows users to view school calendar items.
- b. Class Attendance allows users to view student's attendance information.
- c. Class Timetable allows users to view class timetables of different classes.
- d. Student Info allows users to view individual student information.
- e. Notes allows users to view and edit the content in the Notes widget.
- f. Free Teachers allows users to view free teachers.

## 1.2 Function Chart

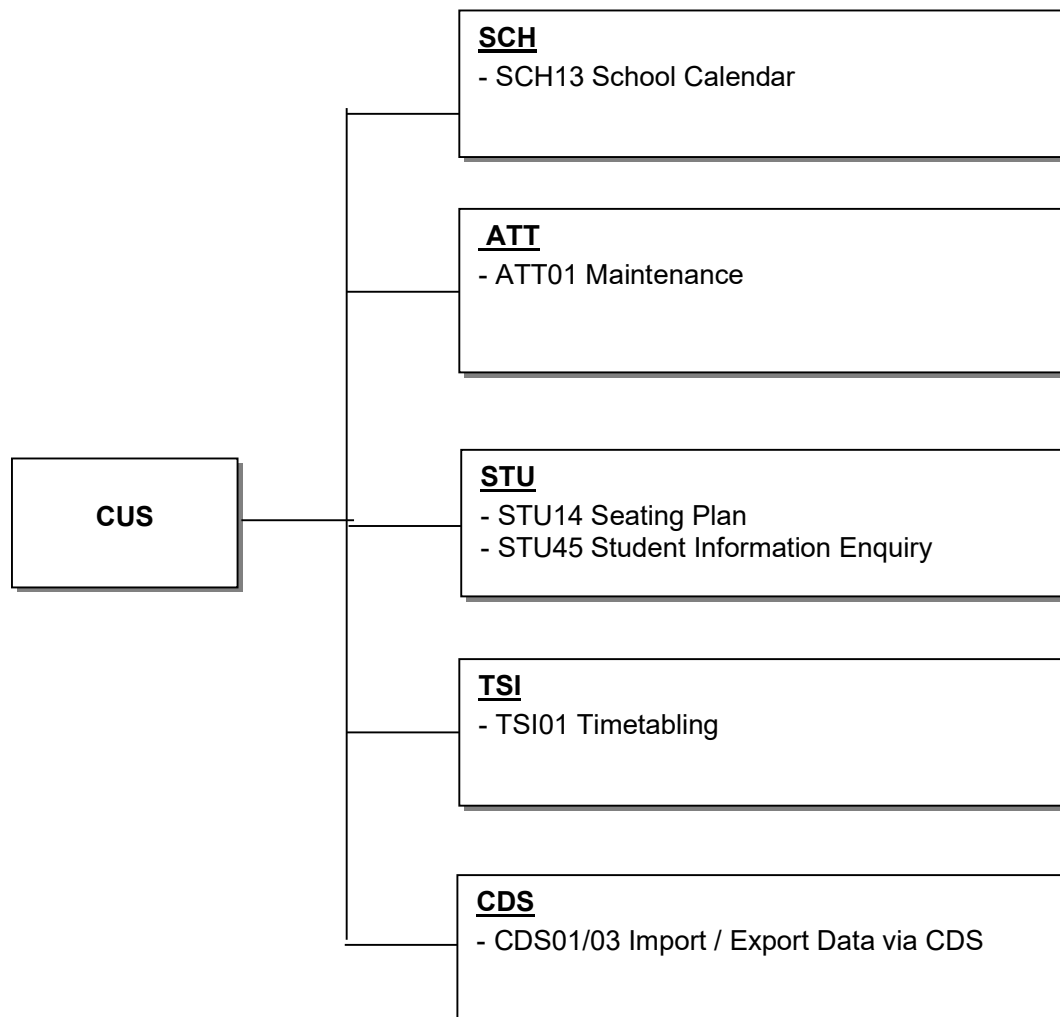
### Customization (CUS)



1.3 Flow Diagram

N/A

1.4 Interactions with other modules



## 2 Operation Procedures

### 2.1 Customization

#### 2.1.1 Account Information



#### Function Description

This function allows users to view account information.



#### Pre-requisites

1. The user must login first.



#### User Procedures

1. Click [**Customization**] → [**Account Information**] on the left menu.
2. System displays **General Information** such as: **School Level, School Session, User Type, User Code, User ID, Password Expiry Information, English/ Chinese User Name, Login Language, User Account Access Time, User Account Internet Access Time, Account Expiry Information** and **User Group(s) attached**.

3. Mapped CloudSAMS User ID and Common Log-on Username are displayed in the Common Log-on Information session.

The screenshot shows the 'Account Information' page in the CloudSAMS system. The left sidebar contains a navigation menu with 'Customization' expanded. The main content area is divided into two sections:

- General Information** (indicated by a red box and the number 2): This section displays user details such as School Level (All), User Type (Staff, Student, Parent, Others), User Code, User ID (su), Password Expiry (Never Expire), English and Chinese User Names, Login Language (English), and User Account Access Time (Monday-Friday: 24 Hours, Saturday: 24 Hours, Sunday: 04:00 To 23:59). It also includes a table for 'User Account Internet Access Time' and an 'Account Expiry' section.
- Common Log-on Information** (indicated by a red box and the number 3): This section features a 'Delete' button and displays the 'Mapped WebsAMS User ID' (su) and 'Common Log-on Username' (we).

Footnotes at the bottom of the page state: (1) Actual access time is also subject to "System Access Time" setting. (2) Actual Internet access time is also subject to "System access time outside VPN segment" setting.

4. User can click **[Delete]** button displayed in the **Common Log-on Information** session to remove the mapping.

Post-effects

N/A

Notes

1. Only your personal account information is shown.

## 2.1.2 Personalization

This function allows users to customize user account personal settings, such as preferred colour scheme and system default language.

### Edit Personal Preferences

#### Function Description

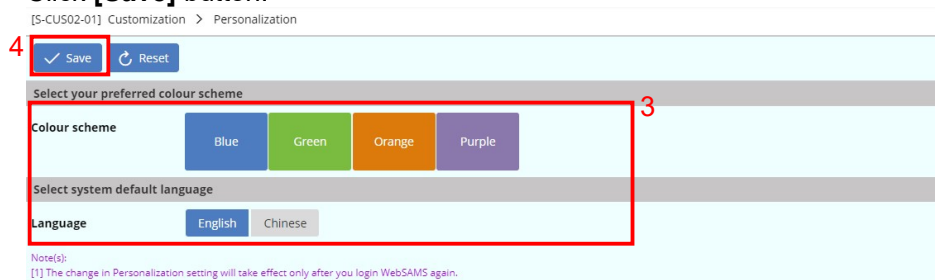
This function allows users to edit personal preferences.

#### Pre-requisites

1. The user must login first.

#### User Procedures

1. Click **[Customization]** → **[Personalization]** on the left menu.
2. **Colour scheme** and **System default language** are displayed and available for personalization.
3. Update the applicable setting. Change of Colour scheme will be displayed upon selection.
4. Click **[Save]** button.



5. Click **[Reset]** button to reset all the setting.

#### Post-effects

1. If user clicks **[Save]** button, system returns success message **“Record saved successfully.”** at the top of the screen.
2. The personal preferences are updated.

#### Notes

1. The change in Personalization setting will take effect only after user logins CloudSAMS again.
2. The available colour schemes are Blue, Green, Orange or Purple.
3. The available default languages are Chinese or English.



### 2.1.3 Change Password

This function allows users to change their user account passwords after logging into the system.

#### Function Description

This use case allows users to change their user account passwords.

#### Pre-requisites

1. The user must login first.

#### User Procedures

1. Click **[Customization]** → **[Change Password]** on the left menu.
2. Enter **Old password**, **New password** and **Re-enter new password** that fulfils valid password format. Then system enables **[Save]** button.

[S-CUS03-01] Customization > Change Password

Enter Old Password	<input type="password"/>
Enter New Password	<input type="password"/>
Re-enter New Password for confirmation	<input type="password"/>

Note(s):  
[1] Password Format:  
- contain English character(s) a-z (lower case)  
- contain English character(s) A-Z (upper case)  
- contain digit(s) 0-9  
- contain special character(s) ("Space" is not allowed)  
[2] The password should fulfill ALL criteria above.  
[3] Length of password: 8-40 characters  
[4] User ID cannot be used as password

3. Click **[Save]** button.

 Post-effects

1. If user clicks **[Save]** button after entering a valid password, system returns a message **“Password changed successfully.”** at the top of the screen.
2. The password is updated.
3. The new password will take effect immediately. The system keeps a number of passwords in the password history for each user.

 Notes

1. Length of password: 8-40 characters.
2. Password is case-sensitive.
3. User ID, the words of "password" and "websams" cannot be used as password.
4. Password format:
  - contain English character(s) a-z (lower case)
  - contain English character(s) A-Z (upper case)
  - contain digit(s) 0-9
  - contain special character(s) ("Space" is not allowed)The password should fulfill ALL of the criteria above.
5. New passwords should not be the same as the ones stored in the password history. The number of passwords stored in password history is maintained in the System Configuration function.

### 2.1.4 Quick Access

This function allows users to choose designated functions and setup quick access buttons in the CloudSAMS home page to allow users to reach these designated functions directly.

#### View Quick Access



#### Function Description

This function allows users to view and access quick access item(s).



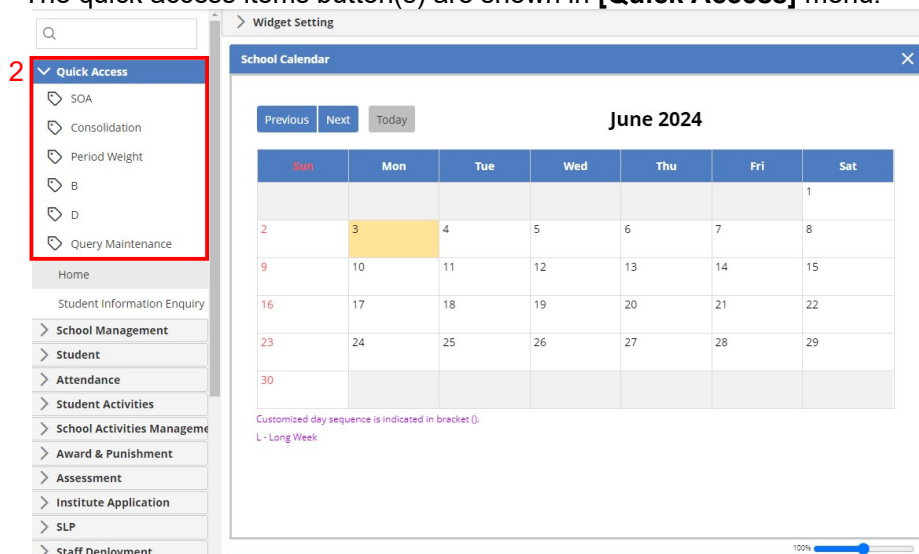
#### Pre-requisites

1. The user must login first.
2. Quick access items are added in **[S-CUS04-01]** Customization > Quick Access.



#### User Procedures

1. Click **[Quick Access]** on the left menu.
2. The quick access items button(s) are shown in **[Quick Access]** menu.



3. Click the selected item in quick access menu.



#### Post-effects

1. System redirects to the designated module function page.



#### Notes

N/A

### Add Quick Access

#### Function Description

This function allows users to add quick access item(s).

#### Pre-requisites

1. The user must login first.

#### User Procedures

1. Click [**Customization**] → [**Quick Access**] on the left menu.
2. Click the [**Add**] button to add a new item.
3. Input the **Module**, **Function**, **Shortcut Chinese name**, **Shortcut English name** and **Order**.

[S-CUS04-01] Customization > Quick Access

Save

<input type="checkbox"/>	Module	Function	Shortcut Chinese name	Shortcut English name	Order
<input type="checkbox"/>	Student	Admission - SOA	A		1
<input type="checkbox"/>	Attendance	Consolidation	C		2
<input type="checkbox"/>	Staff Deployment	Setup - Period Weight			3
<input type="checkbox"/>	School Management	Class Details - By Batch		B	4
<input type="checkbox"/>	Student Activities	Activity Setup		D	5
<input type="checkbox"/>	Data Management	Query Maintenance			6
<input type="checkbox"/>					

4. Click [**Save**] button.

#### Post-effects

1. After user clicks [**Save**] button, system returns a success message “**Record saved successfully.**” at the top of the screen [**S-CUS04-01**].
2. The new quick access records will be added.
3. The new quick access items are added in left menu.

#### Notes

1. Only authorized functions will be displayed in the list.
2. The Quick Access setting is saved per user.
3. All mandatory fields are required to input valid data.
4. For **Order**, negative/ zero/ duplicated value input is invalid.

### Edit Quick Access

#### Function Description

This function allows users to edit quick access item(s).

#### Pre-requisites

1. The user must login first.
2. There are existing quick access item(s).

#### User Procedures

1. Click **[Customization]** → **[Quick Access]** on the left menu.
2. A list of quick access records is shown on the screen **[S-CUS04-01]**
3. Update the **Module**, **Function**, **Shortcut Chinese name**, **Shortcut English name** and **Order**.

[S-CUS04-01] Customization > Quick Access

<input type="checkbox"/>	Module	Function	Shortcut Chinese name	Shortcut English name	Order
<input type="checkbox"/>	Student	Admission - SOA	A		1
<input type="checkbox"/>	Attendance	Consolidation	C		2
<input type="checkbox"/>	Staff Deployment	Setup - Period Weight			3
<input type="checkbox"/>	School Management	Class Details - By Batch		B	4
<input type="checkbox"/>	Student Activities	Activity Setup		D	5
<input type="checkbox"/>	Data Management	Query Maintenance			6

4. Click **[Save]** button.

#### Post-effects

1. After user clicks **[Save]** button, system returns a success message **“Record saved successfully.”** at the top of the screen **[S-CUS04-01]**
2. The quick access records are updated.
3. The quick access items are updated in left menu.

#### Notes

1. All quick access records on screen **[S-CUS04-01]** are sorted by **“Order”**.
2. All mandatory fields are required to input valid data.
3. For **Order**, negative/ zero/ duplicated value input is invalid.

### Delete Quick Access

#### Function Description

This function allows users to delete quick access item(s).

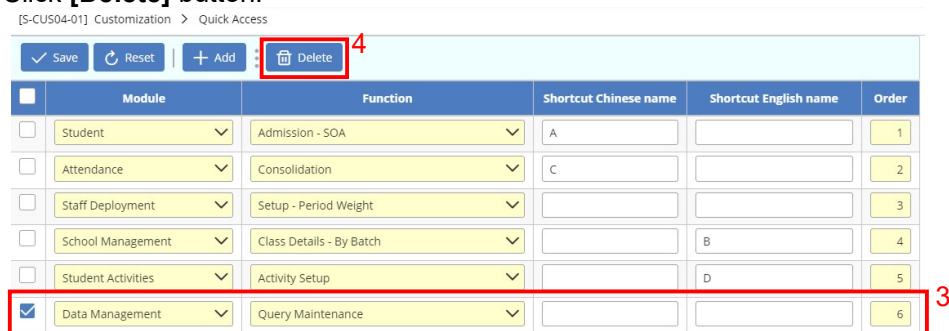
#### Pre-requisites

1. The user must login first.
2. There are existing quick access item(s).

#### User Procedures

1. Click **[Customization]** → **[Quick Access]** on the left menu.
2. All existing quick access records are shown on the screen **[S-CUS04-01]**.
3. Select quick access record checkbox(es).
4. Click **[Delete]** button.

[S-CUS04-01] Customization > Quick Access



<input type="checkbox"/>	Module	Function	Shortcut Chinese name	Shortcut English name	Order
<input type="checkbox"/>	Student	Admission - SOA	A		1
<input type="checkbox"/>	Attendance	Consolidation	C		2
<input type="checkbox"/>	Staff Deployment	Setup - Period Weight			3
<input type="checkbox"/>	School Management	Class Details - By Batch		B	4
<input type="checkbox"/>	Student Activities	Activity Setup		D	5
<input checked="" type="checkbox"/>	Data Management	Query Maintenance			6

5. Click **[Confirm]** button as system returns pop-up dialog box **“Are you sure to delete record(s)?”**

#### Post-effects

1. After user clicks **[Delete]** button, a message **“Record(s) deleted successfully”** will be displayed at the top of the screen **[S-CUS04-01]**.
2. The selected quick access item(s) are deleted.
3. The deleted quick access item(s) are removed from the left menu.

#### Notes

N/A

## 2.2 Notification

### Function Description

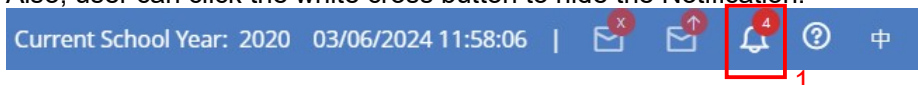
This use case allows school users to view various kinds of notification message(s).

### Pre-requisites

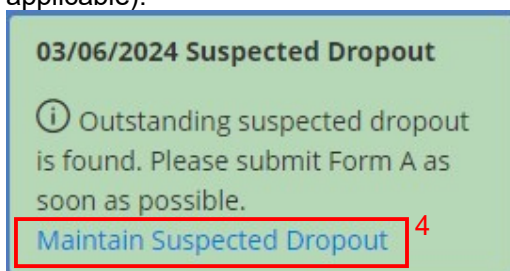
1. The user must login first.
2. Notification is opened to view received notification message(s).
3. There are existing notification message(s) or the system is able to receive new notification message(s).

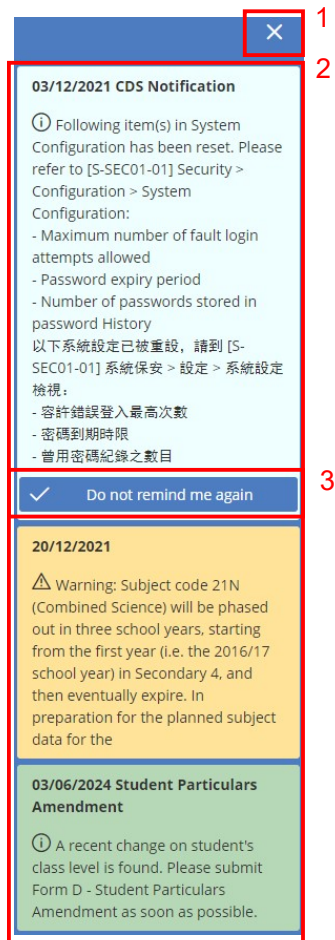
### User Procedures

1. Click **[Notification]** button on the User Menu to show/ hide the Notification. Also, user can click the white cross button to hide the Notification.



2. User can view the following three types of notification message(s):
  - CDS notification (Blue color) – Display notification receiving from CDS module
  - School notification (Yellow color) – Display notification receiving from EDB or CloudSAMS upgrade
  - System notification (Green color) – Display notification receiving from CloudSAMS system
3. Click **[Do not remind me]** button to remove existing CDS message showing in current & future login. Only available for CDS notification messages (if available).
4. User clicks the blue hyperlink (if available) displayed in the notification message to redirect to the corresponding web page, report or CDS files (if applicable).





### Post-effects

1. When user has clicked “**Do not remind me**” button, the message(s) will not be displayed in future logins, and they will not be counted in the notification number on the User Menu.

### Notes

1. When there is no notification message, the default message “No new notifications” is displayed.
2. System displays all outstanding notification message(s) at the Notification. The scroll bar shall be enabled when there are multiple notification messages.
3. System displays different types of notification message(s) in preset order (top to bottom): CDS notifications (Blue color), School notifications (Yellow color), System notifications (Green color).
4. System displays the total number of outstanding notification message(s) on the User Menu.
5. The notification message(s) are implemented individually by respective modules.



## 2.3 Dashboard

Users can edit accessibility of dashboard widgets to view various information and perform different functions. In addition, widget's display settings are customizable according to user's preference.

### 2.3.1 Widget Setting

#### Function Description

Users can enable/ disable selected widgets and change widget's display settings.

#### Set widget accessibility



#### Function Description

User can enable/ disable selected widget(s).



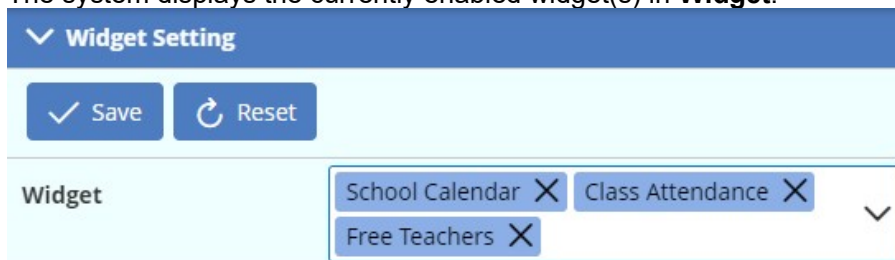
#### Pre-requisites

1. View or use of some widgets requires the user's account to be assigned to the necessary user group.
2. Widgets are available by settings in SEC > Configuration > Dashboard Maintenance.



#### User Procedures

1. Click **[Home]** on the left menu or scroll to browser's top on the home page.
2. The system displays the currently enabled widget(s) in **Widget**.



3. To view the available widget(s), click the dropdown list of **Widget**, or type to search for the widget's name.

- To enable/ disable viewing of widget(s), check or uncheck the selected widget(s).

The screenshot shows the 'Widget Setting' interface. At the top, there are 'Save' and 'Reset' buttons. Below them is a 'Widget' dropdown menu. The dropdown is open, showing a search bar and a list of widgets with checkboxes. The widgets listed are: School Calendar (checked), Class Attendance (checked), Class Timetable (unchecked), Student Info (unchecked), Notes (unchecked), and Free Teachers (checked). A red box highlights the first three items, and a red number '4' is placed to the left of the first three items.

- System will apply the latest widget settings immediately. Click **[Save]** button to confirm. If user wants to discard all changes, click **[Reset]** button.

#### Post-effects

- When it is saved successfully, system will apply the latest saved widget settings immediately and they will also be effective for future logins.

#### Notes

- A maximum of three widgets can be displayed concurrently.
- System shows the error message “E-32550: Not allow to select more than 3 widgets.” if user selects more than three widgets.
- If the settings are not saved successfully, system will revert to the previously saved widget settings.

### Change widget display

#### Function Description

Users can change individual widget's window display settings, including the location, size/ shape and zoom level).



#### Pre-requisites

1. The user's monitor meets the requirements to view widgets in the desired display settings.
2. User does not excessively reduce the browser size, which would prevent the proper display of the widgets.

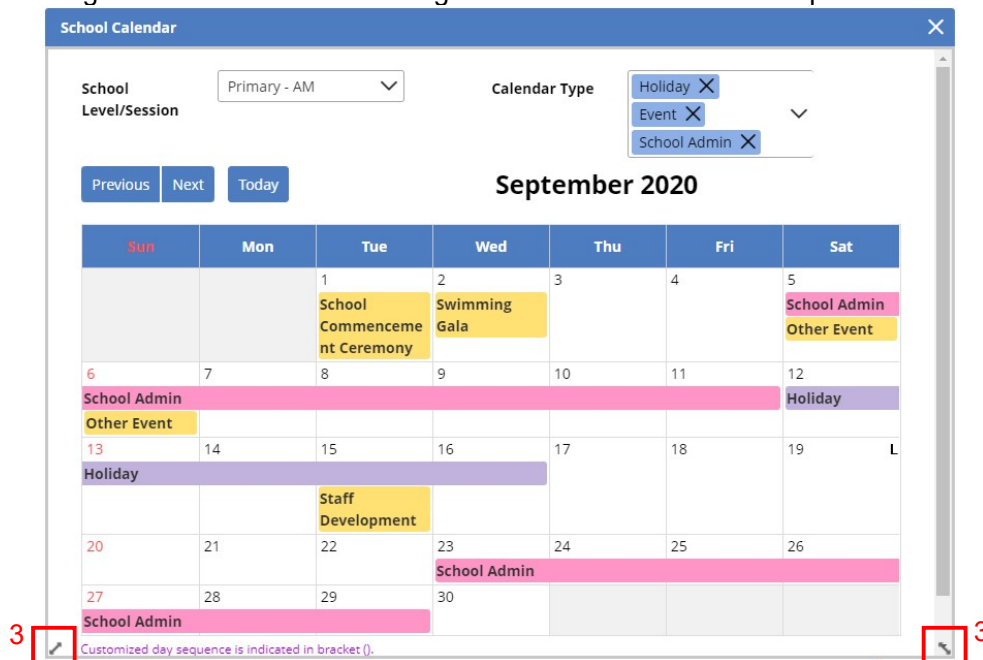


#### User Procedures

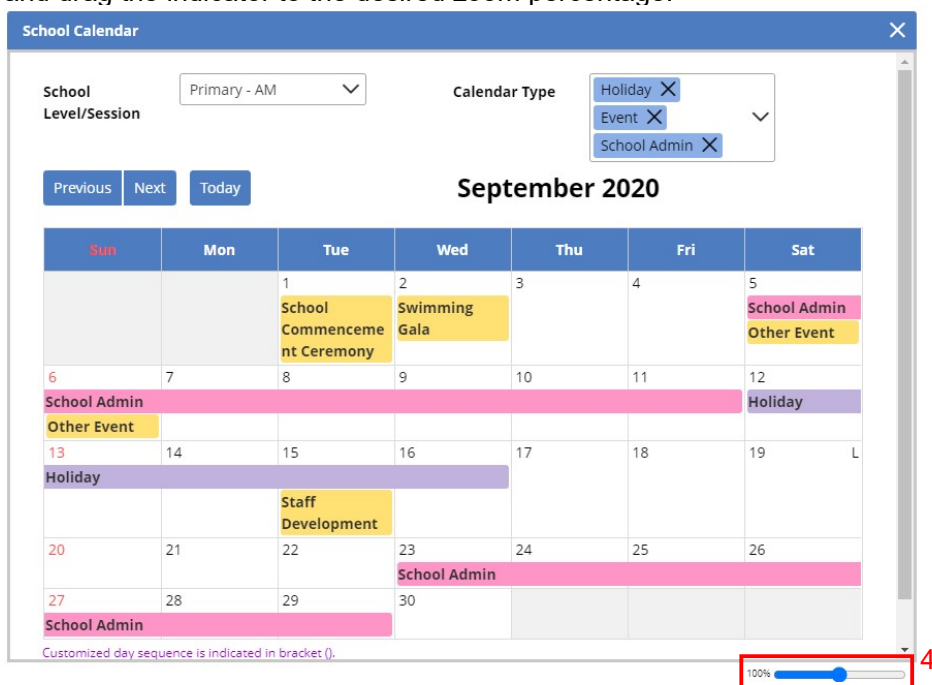
1. Click **[Home]** on the left menu or scroll to selected widget on home page.
2. To change the location of a widget, click and hold on the title panel of the selected widget, then drag the widget to the desired location.

The screenshot shows the 'Widget Setting' interface. At the top, there are 'Save' and 'Reset' buttons. Below them, a 'Widget' dropdown menu is open, showing 'School Calendar', 'Class Attendance', and 'Free Teachers'. The 'School Calendar' widget is highlighted. A red box is drawn around the title bar of the 'School Calendar' window, which is titled 'School Calendar' and has a close button. A red number '2' is placed to the right of the box. The 'School Calendar' window itself shows a calendar for September 2020, with various events like 'School Commencement Ceremony', 'Swimming Gala', 'School Admin', and 'Holiday'.

- To adjust the size and shape of a widget, click and drag the arrow icon at the widget's corner to resize the widget to the desired size and shape.



- To adjust the zoom level of the widget, click on the zoom bar of the widget and drag the indicator to the desired zoom percentage.



- System will apply the latest widget settings immediately. Click **[Save]** button to confirm. If user wants to discard all changes, click **[Reset]** button.

 Post-effects

1. When it is saved successfully, system will apply the latest saved widget settings immediately and they will also be effective for future logins.

 Notes


1. When relocating a widget, system dynamically adjusts the widget's location to align it within the preset browser regions and reorders the display sequence of the widgets.
2. Each widget has a preset minimum display size to prevent excessive shrinkage.
3. The default zoom level of the widget is 100%. The minimum zoom level is 50% and the maximum zoom level is 150%.
4. If the settings are not saved successfully, system will revert to the previously saved widget settings.

2.3.2 Widget

2.3.3 School Calendar

 Function Description

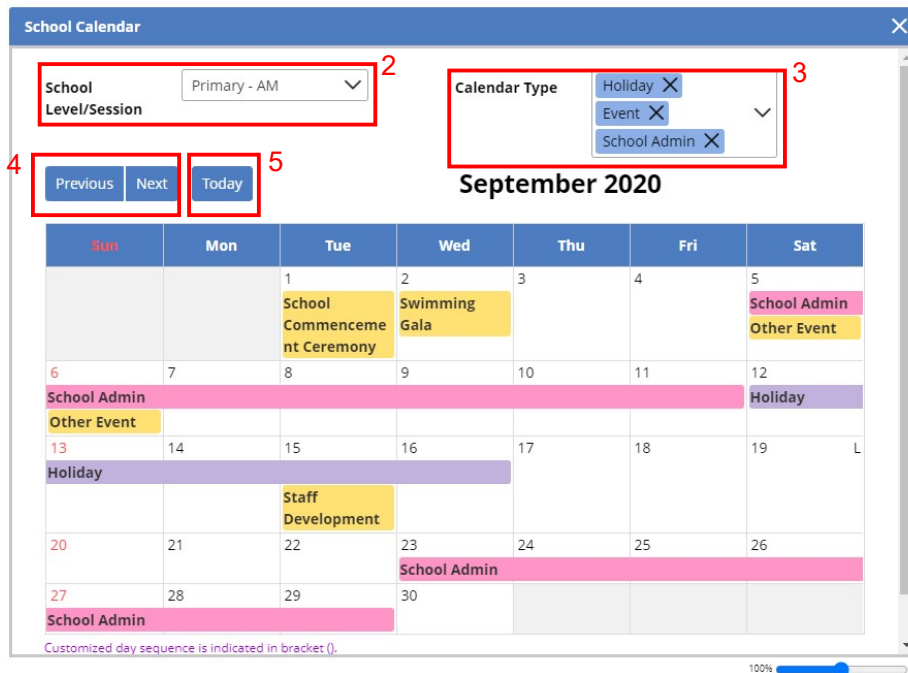
Users can view the school calendar.

 Pre-requisites

1. School calendar item(s) are setup in **School Management > School Calendar > Setup**.
2. Only users who are assigned to “Staff” for User Type can view the school administrative events.

 User Procedures

1. Click **[Home]** on the left menu and select the “School Calendar” widget.
2. Select available **School Level** and **School Session** options to switch viewing school calendar of various school level/ session.
3. In **Calendar Type**, select to view single or multiple categories of School Calendar items (Holiday, Event, School Admin).
4. Click **[Next]** button to display the next month.  
Click **[Previous]** button to display the previous month.
5. Click **[Today]** button to go to the current month and year.



 Post-effects

1. System displays the school calendar with items of the selected calendar type, in the selected month and year.

 Notes

1. The school calendar widget can be viewed by all users but only users who are assigned to “Staff” for User Type can view the school administrative events.
2. The School Calendar widget is set by default to display the current month and year, upon each refresh or entry of the home page.
3. The name, date and color of School Calendar items can be set in **School Management > School Calendar > Setup**.

### 2.3.4 Class Attendance

#### Function Description

User can view student attendance's statistics.

#### Pre-requisites

1. "Class Attendance" widget is enabled in Widget setting.
2. Class has been setup in School Management (SCH) module.
3. Attendance information is available from Attendance (ATT) module.
4. Seating plan information is available from Student (STU) module.

#### User Procedures

1. Click [**Home**] on the left menu and select the "Class Attendance" widget on home page.
2. Select available **School Level, School Session, Class Level, Class Name** options.
3. User view student's count of selected class, in according to various attendance status (Present, Absent, Late, Early Leave, N/A) in different attendance period (Whole Day, AM/ PM).
4. User view student's seating plan/ profile info of selected class.



- To maintain attendance, click **[Maintain Attendance By Class]** button and system returns to **[S-ATT01-01] Attendance > Maintenance > By Class.**

The screenshot shows the 'Class Attendance' window with the following elements:

- 5**: A red box highlights the 'Maintain Attendance By Class' button.
- 2**: A red box highlights the filter section containing:
  - School Level: Secondary
  - School Session: Whole Day
  - Class Level: Secondary 5
  - Class Name: SSD
- 3**: A red box highlights the 'Attendance Figures' table.
- 4**: A red box highlights the student grid below the table.

Attendance Status	Number of Students	
	AM	PM
Present	18	18
Absent	0	0
Late	0	0
Early Leave	0	0
N.A.	0	0

The student grid below the table shows 15 student cards, each with a profile picture and attendance status for AM and PM sessions. The students are labeled as follows:

- Row 1: Student S FiveD Fifteen (7), Student S FiveD Nine (14), Student S FiveD Three (12), Student S FiveD Four (17)
- Row 2: Student S FiveD Five (26), Student S FiveD Six (11), Student S FiveD Eight (5), Student S FiveD Seven (10), Student S FiveD Two (18)
- Row 3: Student S FiveD One (27), Student S FiveD Twenty, Student S FiveD Twenty, Student S FiveD Thirty (20), Student S FiveD Twenty

A 100% progress bar is visible at the bottom of the grid.

Post-effects

- System displays the class attendance information of selected school level/ session, class level/ name.

Notes

- System returns error message “E-42174: Data is not in current school year.” when today is not within current school year.

### 2.3.5 Student Info

#### Function Description

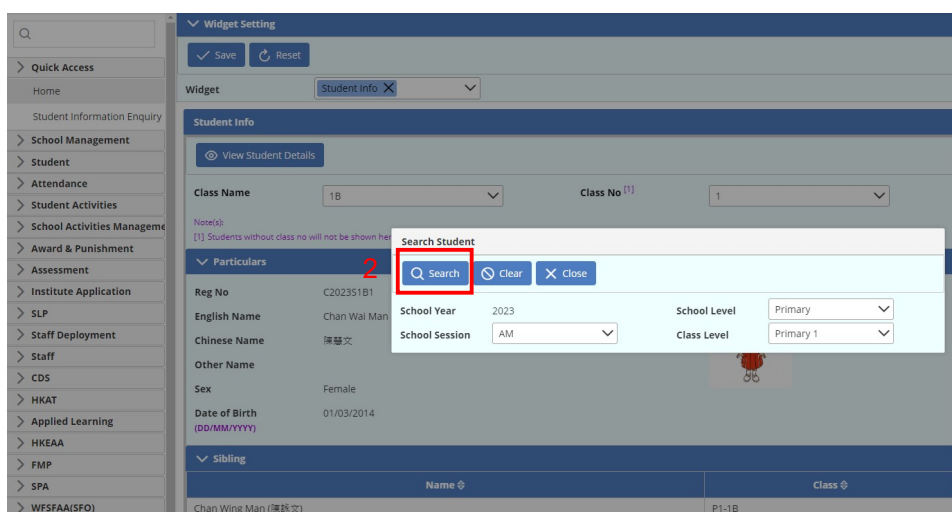
User can view individual student information, including student particulars, sibling, parent / guardian and user-defined fields.

#### Pre-requisites

1. “Student Info” widget is enabled for view via Widget setting.
2. User must be attached to user group “CUS\_USER” and added to Student Data Enquiry Team to view the Student Info widget

#### User Procedures

1. Click [**Home**] on the left menu and select the “Student Info” widget.
2. Select available **School Level**, **School Session** and **Class Level** options to search student in current school year. Click [**Search**] button.



3. Select available **Class Name** and **Class No** options to view student information.

4. Click the **[View Student Details]** button will redirect to [S-STU45-03] Student Information Enquiry > Particulars. User can view student details in Student Information Enquiry.

 Post-effects

N/A

 Notes

1. System only displays the student information of current school year.
2. Student without class no will not be shown in the widget.

### 2.3.6 Notes

#### Function Description

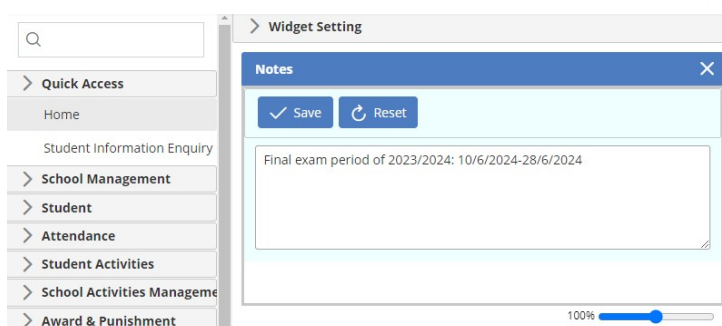
Users can view and edit the content in the Notes widget.

#### Pre-requisites

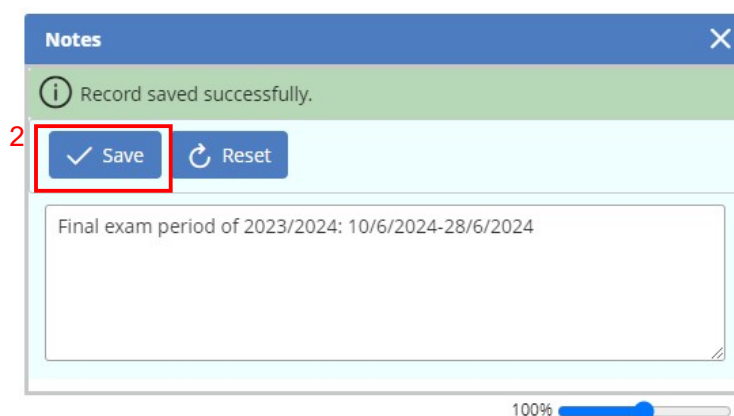
1. “Notes” widget is enabled for viewing via Widget setting.

#### User Procedures

1. Click **[Home]** on the left menu and select the “Notes” widget.



2. Edit the text in the widget and click **[Save]** button.



#### Post-effects

1. If user clicks **[Save]** button, a message “**Record saved successfully.**” will be displayed at the top of the widget.
2. When it is saved successfully, system will apply the latest saved widget settings immediately and they will also be effective for future logins.

 Notes

N/A

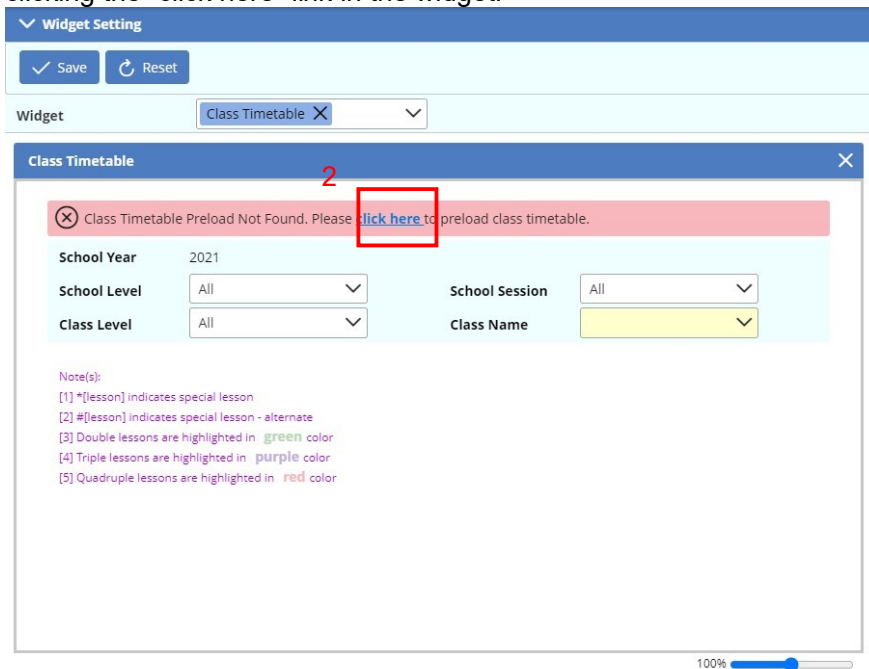
### 2.3.7 Class Timetable

#### Function Description

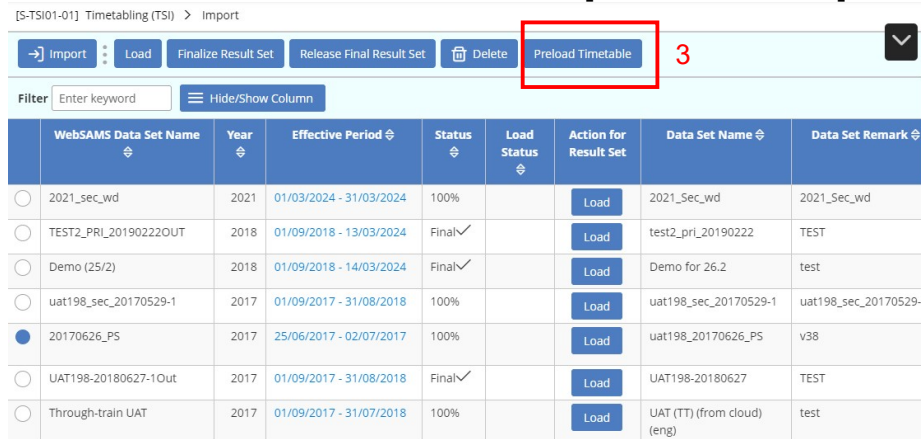
Users can view the class timetables of different classes.

#### Pre-requisites

1. “Class Timetable” widget is enabled for viewing via Widget setting.
2. Preload class timetable in [S-TSI01-01] Timetabling (TSI) > Import by clicking the “click here” link in the widget.

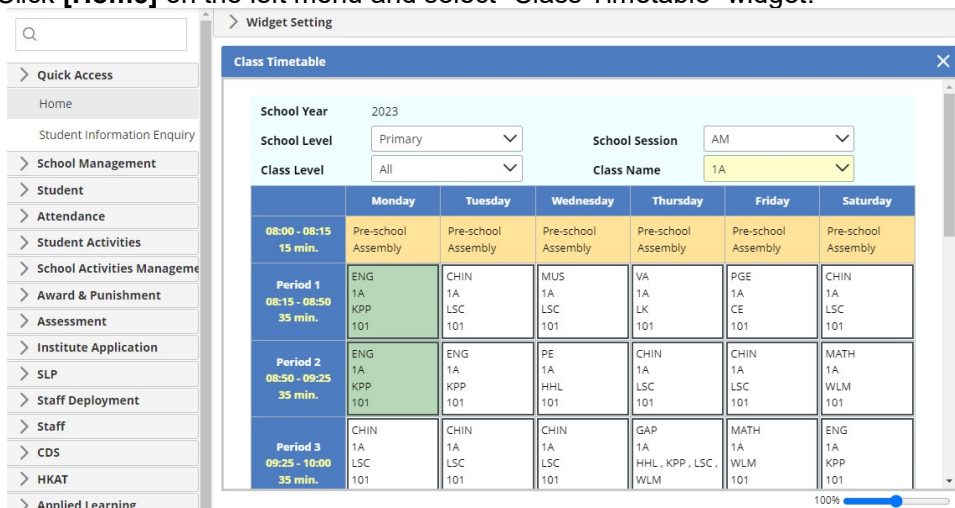


3. Select WebSAMS Data Set Name and click **[Preload Timetable]** button.



 User Procedures

1. Click **[Home]** on the left menu and select “Class Timetable” widget.



Widget Setting

Class Timetable

School Year: 2023

School Level: Primary

School Session: AM

Class Level: All

Class Name: 1A

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
08:00 - 08:15 15 min.	Pre-school Assembly	Pre-school Assembly	Pre-school Assembly	Pre-school Assembly	Pre-school Assembly	Pre-school Assembly
Period 1 08:15 - 08:50 35 min.	ENG 1A KPP 101	CHIN 1A LSC 101	MUS 1A LSC 101	VA 1A LK 101	PGE 1A CE 101	CHIN 1A LSC 101
Period 2 08:50 - 09:25 35 min.	ENG 1A KPP 101	ENG 1A KPP 101	PE 1A HHL 101	CHIN 1A LSC 101	CHIN 1A LSC 101	MATH 1A WLM 101
Period 3 09:25 - 10:00 35 min.	CHIN 1A LSC 101	CHIN 1A LSC 101	CHIN 1A LSC 101	GAP 1A HHL, KPP, LSC, WLM	MATH 1A WLM 101	ENG 1A KPP 101

100%

2. Select the **School Level, School Session, Class Level and Class Name** to view the class timetables of different classes.

 Post-effects

NA

 Notes

1. \*[lesson] indicates special lesson
2. #[lesson] indicates special lesson – alternate
3. Double lessons are highlighted in green color
4. Triple lessons are highlighted in purple color
5. Quadruple lessons are highlighted in red color

### 2.3.8 Free Teachers

#### Function Description

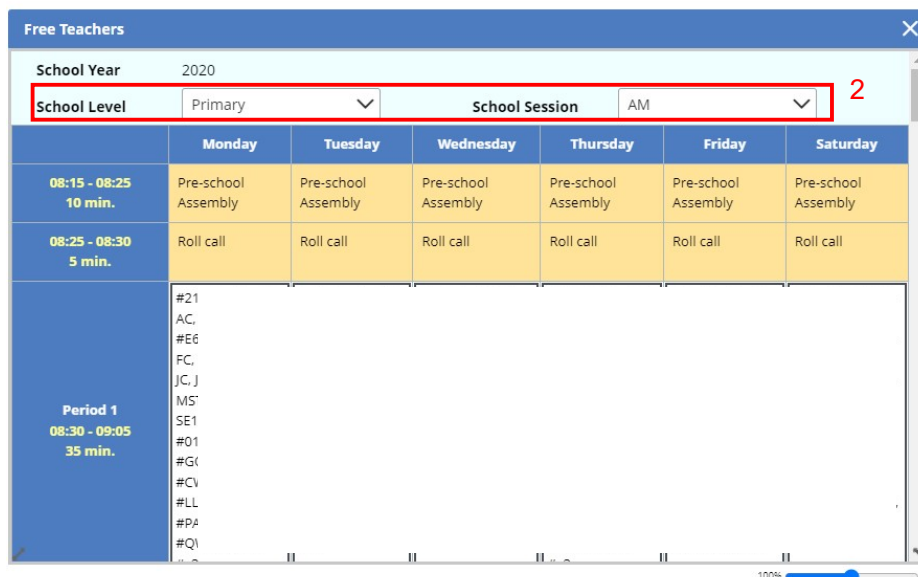
User can view the Free Teachers widget.

#### Pre-requisites

1. “Free Teachers” widget is enabled in Widget setting.
2. A 100% completion STT result set in current school year has been finalized in TSI module.

#### User Procedures

1. Click **[Home]** on the left menu and select the “Free Teachers” widget.
2. Select **School Level** and **School Session** to switch viewing free teachers of various school level/ session, subject to the availability.



	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
<b>08:15 - 08:25</b> 10 min.	Pre-school Assembly	Pre-school Assembly	Pre-school Assembly	Pre-school Assembly	Pre-school Assembly	Pre-school Assembly
<b>08:25 - 08:30</b> 5 min.	Roll call	Roll call	Roll call	Roll call	Roll call	Roll call
<b>Period 1</b> 08:30 - 09:05 35 min.	#21 AC #EE FC JC, J MS SE1 #01 #G #CV #LL #PA #Q					

#### Post-effects

N/A

#### Notes

1. The free teachers widget is displayed in current school year by default.
2. The free teachers widget may be displayed in week-based or cycle-based according to the timetable structure of the finalized result set.
3. System returns to a warning message: “Finalized result set is not available. Please [click here](#) to finalize result set.”, when finalized result set is unavailable in TSI module. To finalize result set, please click the link from the warning message or visit **[S-TSI01-01] Timetabling (TSI) > Import**.