



# CloudSAMS USER MANUAL Report Management

**(Document 27e)**

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## **1 Module Overview**

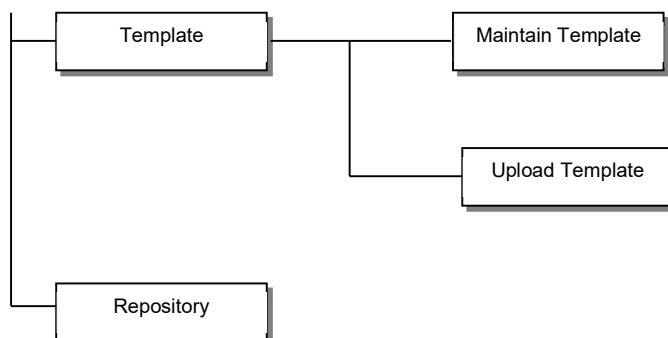
### 1.1 Introduction

#### 1.1.1 Objective

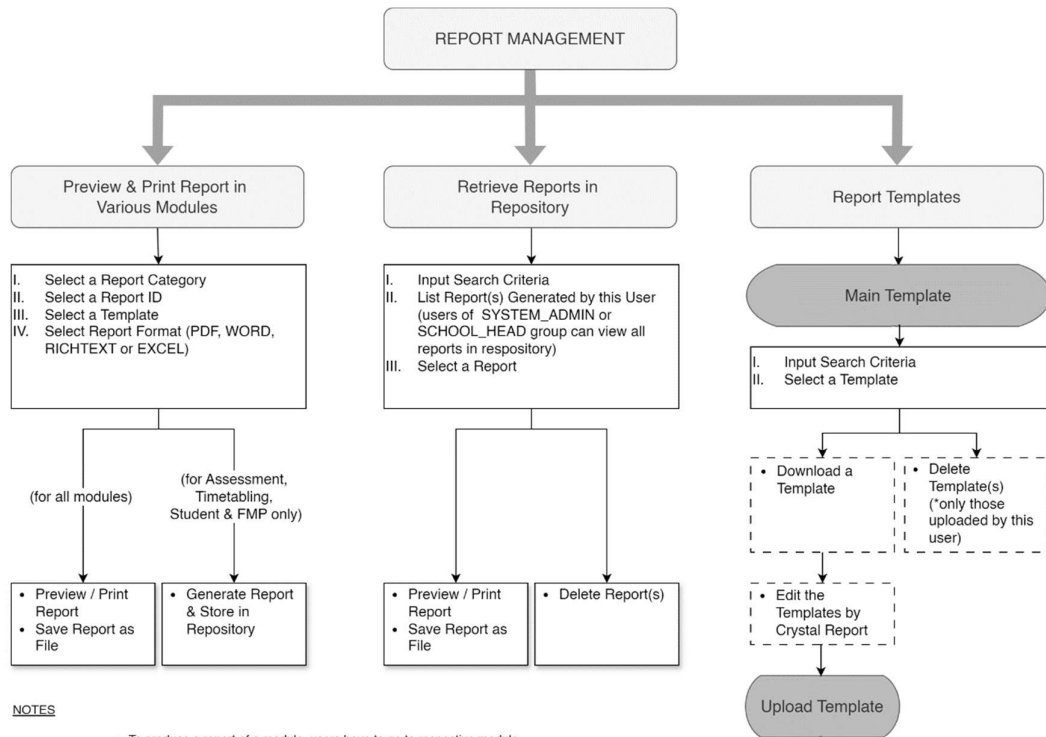
Report Management Module is used to maintain report templates and reports stored in repository. This document provides knowledge and corresponding procedural guide on Report Management Module functions and report functions in individual modules.

## 1.2 Function Chart

### Report Management



1.3 Flow Diagram



NOTES

- REPORT:
  - To produce a report of a module, users have to go to respective module.
  - For a few modules, reports can be stored in the repository under the module of Report Management.
- TEMPLATE:
  - The template of a report has to be selected first to produce the respective report.
  - Templates are maintained in the module of Report Management.

Module

Function

Sub - function

Report Management

Template →



Report Management

Repository →

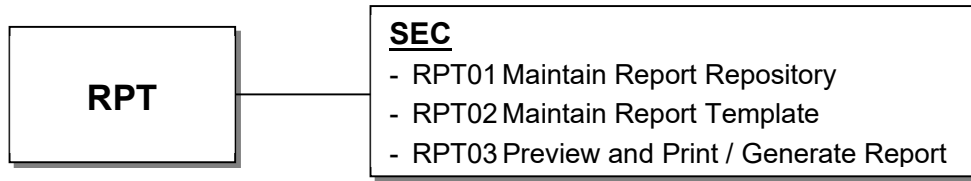


Individual Module

Report →



## 1.4 Interactions with other modules



### **RPT01 – Maintain Report Repository**

- SECURITY
  - Get user group and permission right

### **RPT02 – Maintain Report Template**

- SECURITY
  - Get user group and permission right

### **RPT03 – Preview and Print / Generate Report**

- SECURITY
  - Get user group and permission right

## 2 Operation Procedures

### 2.1 Template

Users can download report template for maintenance and upload the updated template in the Template function.

#### 2.1.1 Maintain Template

Users can search the required report template and perform delete or download operation.

Users can search by the following criteria:

- Module
- Category
- Type
- Language

The search results are ordered by Report Name (ID). Users can re-order the search results by clicking on the following column headings of the table of the search results:

- Template Description
- Module
- Category
- Type
- Creator
- Creation Date

#### [View Sample Report of Template](#)



#### Function Description

Users can view the sample reports of both built-in templates and user-defined templates.



#### Pre-requisites

Adobe Acrobat Reader and Microsoft Office are required to view the sample report of the template.



#### User Procedures

1. Click **[Report Management]** → **[Template]** on the left menu.
2. Click the **Maintain Template** tab.

3. Select the search criteria to search for the target templates to be viewed.
4. Click the **[Search]** button.

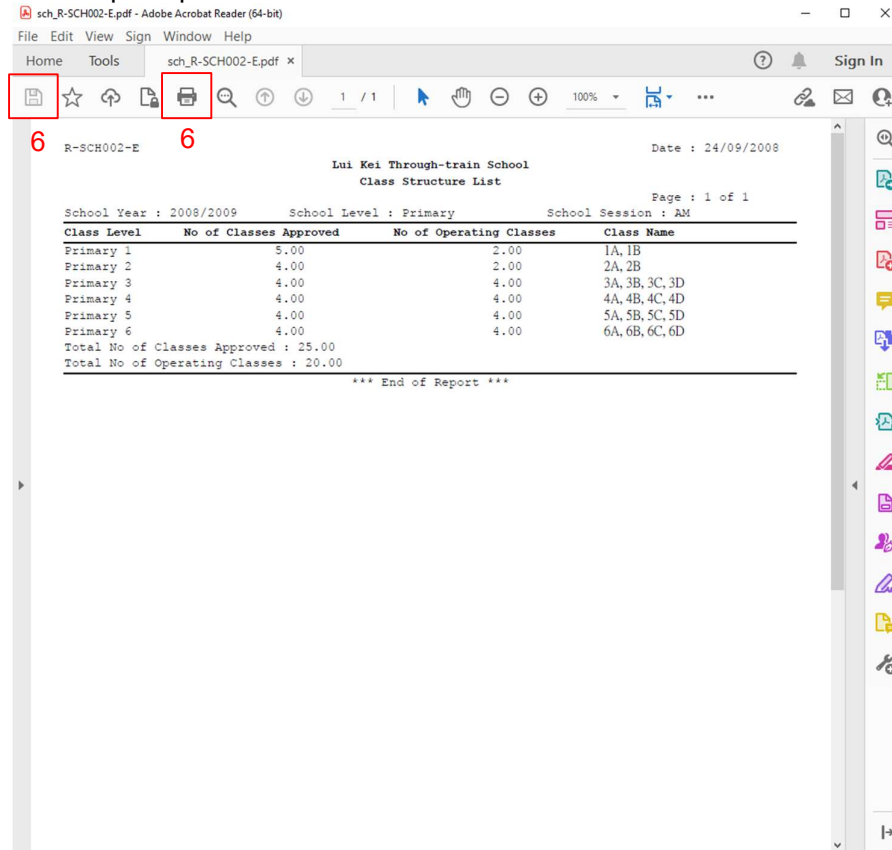
The screenshot shows the 'Maintain Template' page in the CloudSAMS system. The left sidebar contains a navigation menu with 'Report Management' selected. The main content area has a 'Search Report' section with a search bar, a 'Clear' button, and filters for Module, Category, Type, and Language. Below the filters is a 'Delete' button and a table of templates. The table has columns for Report Name (ID), Template Description, Type, Creator, and Creation Time. A red box highlights the search bar and the search button.

	Report Name (ID) ⚙	Template Description ⚙	Type ⚙	Creator ⚙	Creation Time ⚙
<input checked="" type="checkbox"/>	<a href="#">1st Join Appointment/ Termination of Service Report (R-STF007-E)</a>	Built-in Template	Built-in	---	---
<input type="checkbox"/>	<a href="#">1st Join Appointment/ Termination of Service Report (R-STF007-E)</a>	Test 20231207 1029 BO	User-Defined	super1	2023-12-07 10:30 AM
<input type="checkbox"/>	<a href="#">1st Join Appointment/ Termination of Service Report (R-STF007-E)</a>	Check remove MAPPOR	User-Defined	super1	2023-12-08 11:15 AM
<input checked="" type="checkbox"/>	<a href="#">Academic Performance (sorted by student) (R-INA001-E)</a>	Built-in Template	Built-in	---	---
<input checked="" type="checkbox"/>	<a href="#">Academic Performance (sorted by subject) (R-INA002-E)</a>	Built-in Template	Built-in	---	---
<input checked="" type="checkbox"/>	<a href="#">Academic Performance / OLE / Lists of Awards and Major Achievements Issued by the School (R-SLP005)</a>	Built-in Template	Built-in	---	---
<input checked="" type="checkbox"/>	<a href="#">Academic Performance Supplementary Information (R-INA003-E)</a>	Built-in Template	Built-in	---	---

5. A list of matched templates is displayed. Select a template from the list and click on the **Report Name(ID)** link to view the sample report of the template



6. The sample report is shown in a pop-up screen with the use of the application, Adobe Acrobat Reader. Users can choose to preview, print or save the sample report to their local machine.



 Post-effects

N/A

 Notes


N/A

### Download Template for Modification

 Function Description

Users can download both built-in templates and user-defined templates from CloudSAMS and then make amendments to the report template with the use of the Crystal Report application.

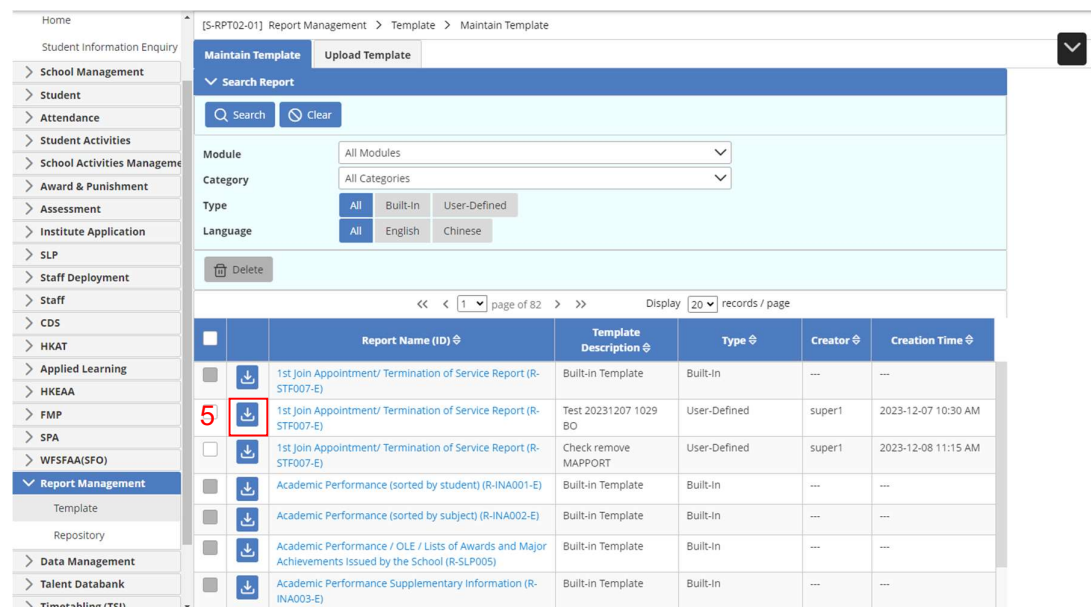
To edit a report template, users first download it and then use the Crystal Report application to open the template for editing.








 Pre-requisites

Crystal Report is required to be installed into the computer to amend the report template.

 User Procedures

1. Click **[Report Management]** → **[Template]** on the left menu.
2. Click the **Maintain Template** tab.
3. Select the search criteria to search for the target templates to be viewed.
4. Click the **[Search]** button.
5. A list of matching templates is displayed. Select a template from the list and click the **[Download]** button on the left to download the template for modification.



	Report Name (ID)	Template Description	Type	Creator	Creation Time
	1st Join Appointment/ Termination of Service Report (R-STF007-E)	Built-in Template	Built-In	---	---
5		1st Join Appointment/ Termination of Service Report (R-STF007-E)	Test 20231207 1029 BO	User-Defined	super1 2023-12-07 10:30 AM
	1st Join Appointment/ Termination of Service Report (R-STF007-E)	Check remove MAPPOR	User-Defined	super1	2023-12-08 11:15 AM
	Academic Performance (sorted by student) (R-INA001-E)	Built-in Template	Built-In	---	---
	Academic Performance (sorted by subject) (R-INA002-E)	Built-in Template	Built-In	---	---
	Academic Performance / OLE / Lists of Awards and Major Achievements Issued by the School (R-SLP005)	Built-in Template	Built-In	---	---
	Academic Performance Supplementary Information (R-INA003-E)	Built-in Template	Built-In	---	---

- The downloaded template must be opened and modified using the software Crystal Report.

Grade Code	Grade (Eng)	Grade (Chi)	Min. Value	Inclusive	Percentile	Passing Grade
<b>5** Grade table</b>						
A+	A+	A+	>=90.00		---	C
A	A	A	>=80.00		---	C
B	B	B	>=70.00		---	C
C	C	C	>=60.00		---	C
D	D	D	>=50.00		---	C
E	E	E	>=40.00		---	C
F	F	F	>=30.00		---	C
<b>ABCD</b>						
A	A	A	>=80.00		---	C
B	B	B	>=60.00		---	C
C	C	C	>=40.00		---	C
D	D	D	>=20.00		---	C
E	E	E	>=20.00		---	C
F	F	F	>= 0.00		---	C
<b>ABCDEF</b>						
A	A	A	>=90.00		---	E
B	B	B	>=80.00		---	E
C	C	C	>=70.00		---	E
D	D	D	>=60.00		---	E
E	E	E	>=50.00		---	E
F	F	F	>= 0.00		---	E
<b>new table</b>						
A	A	A	>=90.00		---	D
B	B	B	>=80.00		---	D
C	C	C	>=70.00		---	D
D	D	D	>=60.00		---	D
E	E	E	>=50.00		---	D
F	F	F	>= 0.00		---	D
<b>TEST</b>						
A	A	A	>=100.00		---	A
B	Amazing Summe	Blissful	>=50.00		---	A

- Edit and save the template.

 Post-effects

In order to use the report template in the corresponding module, users need to upload the modified template to CloudSAMS. (*Refer to 2.1.2 Upload Template*)

 Notes


1. For modifying the downloaded template:
  - a. Users can connect to database through ODBC driver.
  - b. Users will be prompted to enter the password if they access the database.
  - c. Users can Add / Remove text object (a text object is a specialized object that can contain text, database fields and formula fields) in the report template.
  - d. Users cannot Add / Remove parameter field (a special kinds of field that prompts the users for a value) in the report template.
2. In the event of CloudSAMS upgrade, if there is any change in the database structure where the user-defined report template refers to, the user-defined report template will not function.
3. Database views will be built on a need basis to facilitate users to add database fields to a user-defined report template.
4. Sample reports in PDF format will be provided for all built-in report templates.

Delete Template

 Function Description

Users can delete the report template of individual module.

- Only user-defined template can be deleted. The template uploaded by users is called user-defined template.
- Built-in template cannot be deleted. Therefore, there is no checkbox for deletion at the left of each built-in template.

 Pre-requisites

N/A

 User Procedures

1. Click **[Report Management]** → **[Template]** on the left menu.
2. Click the **Maintain Template** tab.
3. Select the search criteria to search for the target templates to be deleted.
4. Click the **[Search]** button.

- A list of matching template is displayed. Select the user-defined template(s) to be deleted from the list by checking the box(es) on the left.

The screenshot shows the 'Maintain Template' page in the CloudSAMS system. The left sidebar contains a navigation menu with 'Report Management' selected. The main content area has a search bar and filters for Module, Category, Type, and Language. Below these filters is a table of templates. The table has columns for Report Name (ID), Template Description, Type, Creator, and Creation Time. One row, 'Class Basic Information (R-SCH006-E)', is highlighted in red and has a checkbox selected. A red arrow points from a text box to this row. The text box contains the text: 'Only User-defined template can be deleted.'

	Report Name (ID) ↕	Template Description ↕	Type ↕	Creator ↕	Creation Time ↕
<input type="checkbox"/>	Class Basic Information (R-SCH006-E)	Built-in Template	Built-in	---	---
<input checked="" type="checkbox"/>	Class Basic Information (R-SCH006-E)	Testing 1	User-Defined	super1	2023-12-13 03:38 PM
<input type="checkbox"/>	Class Enrolment List (R-SCH007-E)	Built-in Template	Built-in	---	---
<input type="checkbox"/>	Class Structure List (R-SCH002-E)	Built-in Template	Built-in	---	---
<input type="checkbox"/>	Class Subject / Subject Group List (R-SCH008-E)	Built-in Template	Built-in	---	---
<input type="checkbox"/>	Classroom Designation List (R-SCH004-E)	Built-in Template	Built-in	---	---
<input type="checkbox"/>	Cross-Class Subject (Subject Block) List (R-SCH021-E)	Built-in Template	Built-in	---	---
<input type="checkbox"/>	Group for Cross-Class Subject List (R-SCH014-E)	Built-in Template	Built-in	---	---
<input type="checkbox"/>	School Calendar (R-SCH010-E)	Built-in Template	Built-in	---	---

- Click the **[Delete]** button to delete the selected template(s).



#### Post-effects

After clicking on the **[Search]** button, the search results are displayed below the search criteria.



#### Notes

- Only user-defined templates can be deleted, but not for built-in templates where no selection boxes are available.
- A user-defined template can be deleted only by the user who uploaded this template or by those users in the user group of SCHOOL\_HEAD or SYSTEM\_ADMIN.
- The checkbox at the left for deletion of a user-defined template will be available only for the uploader of this template. However, checkboxes at the left of all user-defined templates will also be available for users of the user group of SCHOOL\_HEAD or SYSTEM\_ADMIN for housekeeping.

## 2.1.2 Upload Template

### Function Description

Users can upload the report template which can then be accessed in the report function in individual modules.

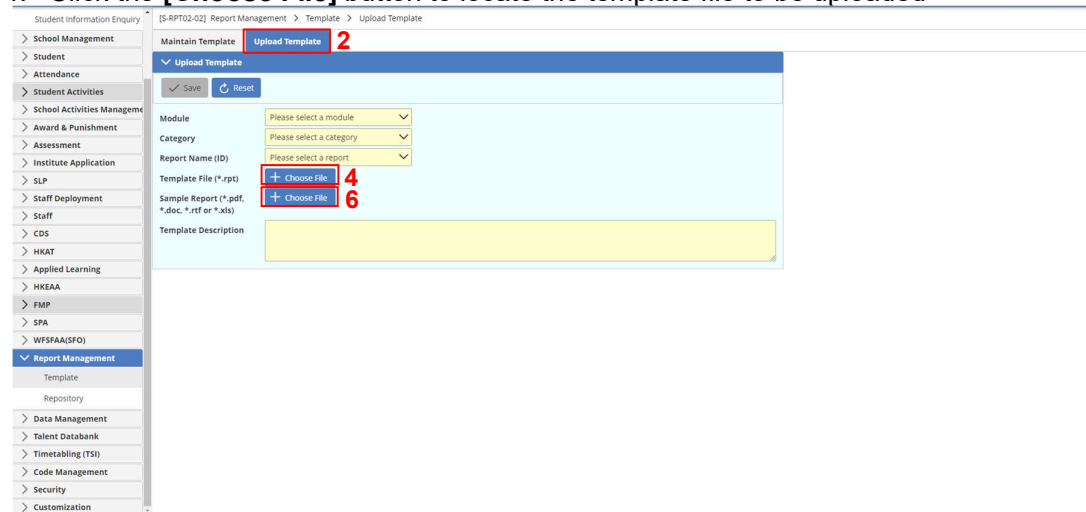
Upload template allows users to upload a report template for producing the corresponding report by using the “Report” function in the respective modules. The templates uploaded are called user-defined templates.

### Pre-requisites

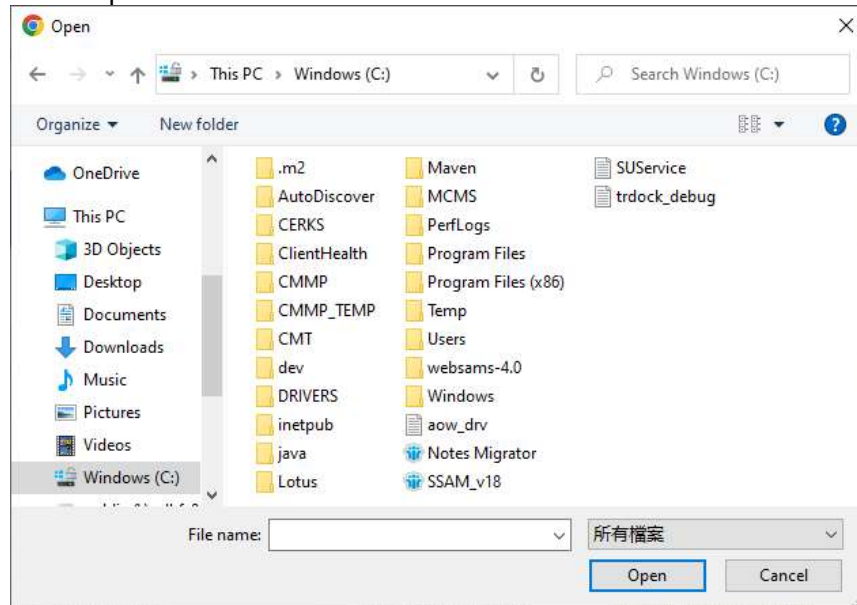
N/A

### User Procedures

1. Click **[Report Management]** → **[Template]** on the left menu.
2. Click the **Upload Template** tab.
3. Select / Enter the **Module**, **Category** and **Report Name (ID)** for the template to be uploaded. Enter the **Template Description** for easy reference during future retrieval of templates.
4. Click the **[Choose File]** button to locate the template file to be uploaded



5. In the pop-up window, browse and select a **Template File** in your computer to be uploaded.



6. Users can choose to upload the sample report for the template by clicking the **[Choose File]** button beside the text box of **Sample Report**.
7. Click the **[Save]** to upload the modified template.



#### Post-effects

Uploaded templates can be assessed through the Report function in individual modules.



#### Notes

1. Only the users who have been granted the rights to access the Tab page of “Upload Template” under the Template function of Report Management can upload report templates.
2. There could be multiple templates with the same report Name and report ID.
3. Report templates cannot be replaced. If users want to update the existing user-defined templates. Users have to delete the templates and then upload the updated version.
4. Uploaded templates are called user-defined template.
5. The format of the report template should be rpt.
6. The format of the sample report should be pdf, doc, rtf or xls.
7. The file size of the template file and sample report cannot exceed 10MB.

## 2.2 Repository

Users can search and view the reports if the users have the right to do so. Those users who have the right to view a report may not have the right to delete it. However, the uploader of a report to the repository always has the right to delete the report.

On the Repository screen, users can search reports by the following criteria:

- Module
- Category
- Report Name (ID)
- Report Description
- Language
- Creator
- Creation Date (From)
- Creation Date (To)
- Status

The search results are ordered by Report Name (ID) by default. Users can reorder the search results by clicking on the following column headings of the table of search results:

- Report Description
- Module (The column of Module will not be displayed if users have selected a certain Module as one of the search criteria)
- Category
- Creator
- File
- Creation Date
- Status

Only a few modules, i.e. Assessment, FMP, Student and Timetabling (TSI), provide the function of generating reports and storing the reports in the report repository.

For Security module, only the report "Student / Parent Account Generation Report" is stored in Repository. This report is generated by the system automatically after the student or parent accounts have been batch created.



## View Report



### Function Description

Users can generate report and save to the report repository with the use of “To File” function. Reports saved in the report repository can be retrieved in the Repository function in the Report Management Module.



### Pre-requisites

1. Adobe Acrobat Reader and Microsoft Office are required to be installed on the workstation to view the report.
2. When users try to search the reports stored in repository, only those reports that the users have data access rights will be listed in the search results.
3. The report status is “Done”.



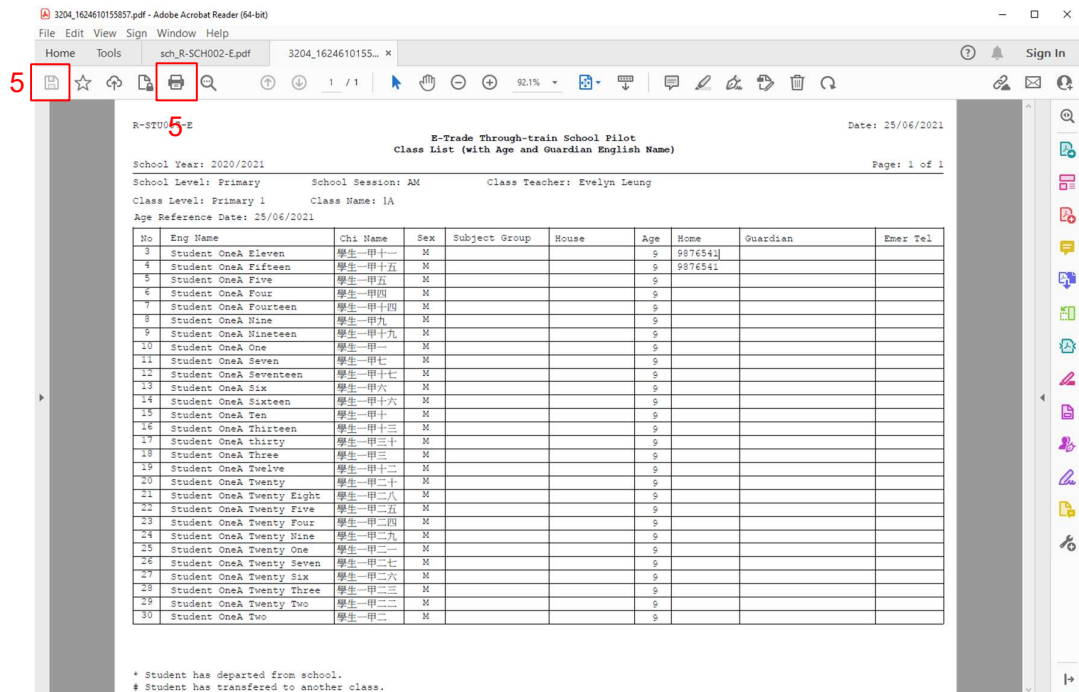
### User Procedures

1. Click **[Report Management]** → **[Repository]** on the left menu.
2. Select the search criteria to search for the target reports to be viewed.
3. Click the **[Search]** button.
4. A list of matching reports is displayed. Select a report from the list and click on the **Report Name(ID)** link to view the report.

No hyperlink will be provided for report with “Error” or “In Progress” status.

Report Name (ID)	Report Description	Creator	Format/Size	Creation Time	Status
STU070(E)			8 KB	PM	
<a href="#">Admission from POA List (R-STU070-E)</a>	070pdf	super1	PDF 39 KB	2023-07-10 02:45 PM	Done
<a href="#">Admission from POA List (R-STU070-E)</a>	test student report R-STU070-E	super1	PDF 39 KB	2023-01-20 04:30 PM	Done
<a href="#">Admission from POA List (R-STU070-E)</a>	Test	super1	PDF 39 KB	2023-01-09 05:44 PM	Done
<a href="#">Admission from POA List (R-STU070-E)</a>	testing report for Admission from POA List	super1	PDF 38 KB	2021-11-19 09:33 AM	Done
<a href="#">Admission from SFP List (R-STU002-E)</a>	test 2/12	super1	PDF 38 KB	2022-12-02 11:39 AM	Done
<b>4</b> <a href="#">Audit Trail Log (R-FC5005-E)</a>	test audit trail log report (20 Jan 2023)	super1	PDF 0 KB	2023-01-20 02:07 PM	<b>Error</b>
<a href="#">Bank Details (R-FC5007-E)</a>		super1	PDF 37 KB	2023-05-03 11:32 AM	Done
<a href="#">Checklist on the Lists of Awards and Major Achievements Issued by the School (R-SLP010-E)</a>	20160601	sysadmin	PDF 54 KB	2017-09-22 04:29 PM	Done
<a href="#">Class List (with Age and Guardian English Name) (R-STU007-E)</a>	a	super1	PDF 54 KB	2023-06-12 11:32 AM	Done

- The report is shown in a pop-up screen with the use of the corresponding application such as Adobe Acrobat Reader. Users can choose to preview, print or save the report to their local machine.



### Post-effects

#### Search

- Reports with status "Error" or "In Progress" will have no hyperlink for users to click on. Only reports with status "Done" can be viewed.

#### View

- The report will be shown in a new window. After viewing, users can print the report through browser print or perform a "File Save As" action to save the report in local hard drive.



### Notes

- The report would have the following status:

- In Progress

- Users have submitted the request to generate the report. The report is currently being generated.
- Has no hyperlink as it is not ready for viewing.

- Done

- The report has been generated and ready for viewing.
- A hyperlink is displayed at the Report Name (ID) to allow users to click on for viewing.

- c. Error
  - There is error generating the report.
  - Has no hyperlink as it is not ready for viewing.
2. There could be multiple reports with the same report Name and report ID.
3. The rights for users to generate reports for the five concerning modules (Assessment, Special Assessment, Student, FMP and Timetabling (TSI)) are set in the “Maintain Access Right” function of Security Module. The flow is:
  - a. Click on the link at a user group (Security > Access Control > User Group).
  - b. At the page of “Access Right”, click the link at “Report Management”.
  - c. Check the “Execute” box to grant right.

### Delete Report



#### Function Description

Users can generate report and save to the report repository with the use of “To File” function. Reports saved in the report repository can be deleted in Repository function in the Report Management Module.



#### Pre-requisites

N/A



#### User Procedures

1. Click **[Report Management]** → **[Repository]** on the left menu.
2. Select the search criteria to search for the target reports to be viewed.
3. Click the **[Search]** button.
4. A list of matching reports is displayed. Select report(s) to be deleted from the list by checking the box on the left.

The screenshot shows the CloudSAMS interface for Report Management. On the left sidebar, the 'Report Management' menu is expanded, and the 'Repository' option is highlighted with a red number '4'. The main content area displays a table of reports with columns for Report Name (ID), Report Description, Creator, Format/Size, Creation Time, and Status. The 'Audit Trail Log (R-FCS005-E)' report is selected, indicated by a checked checkbox in the first column. A red box highlights this checkbox. The report details show it was created by 'super1' on 2023-01-20 02:07 PM and has a status of 'Error'. A note at the bottom of the table states: '\* Click on the link of Report Name (ID) to view a Report'.

<input type="checkbox"/>	Report Name (ID) ⚙	Report Description ⚙	Creator ⚙	Format/Size ⚙	Creation Time ⚙	Status ⚙
<input type="checkbox"/>	STU070-E			8 KB	PM	
<input type="checkbox"/>	Admission from POA List (R-STU070-E)	070pdf	super1	PDF 39 KB	2023-07-10 02:45 PM	Done
<input type="checkbox"/>	Admission from POA List (R-STU070-E)	test student report R-STU070-E	super1	PDF 39 KB	2023-01-20 04:30 PM	Done
<input type="checkbox"/>	Admission from POA List (R-STU070-E)	Test	super1	PDF 39 KB	2023-01-09 05:44 PM	Done
<input type="checkbox"/>	Admission from POA List (R-STU070-E)	Testing report for Admission from POA List	super1	PDF 38 KB	2021-11-19 09:33 AM	Done
<input type="checkbox"/>	Admission from SFP List (R-STU002-E)	test 2/12	super1	PDF 38 KB	2022-12-02 11:39 AM	Done
<input checked="" type="checkbox"/>	Audit Trail Log (R-FCS005-E)	test audit trail log report (20 Jan 2023)	super1	PDF 0 KB	2023-01-20 02:07 PM	Error
<input type="checkbox"/>	Bank Details (R-FCS007-E)		super1	PDF 37 KB	2023-05-03 11:32 AM	Done
<input type="checkbox"/>	Checklist on the Lists of Awards and Major Achievements Issued by the School (R-SLP010-E)	20160601	sysadmin	PDF 54 KB	2017-09-22 04:29 PM	Done
<input type="checkbox"/>	Class List (with Age and Guardian English Name) (R-STU007-E)	a	super1	PDF 54 KB	2023-06-12 11:32 AM	Done

5. Click the **[Delete]** button and confirm the operation.



#### Post-effects

The report(s) will be deleted from the repository permanently. It is not possible to retrieve the report(s) for viewing again.



#### Notes

1. Users (except users of SCHOOL\_HEAD and SYSTEM\_ADMIN groups) can only delete the reports that are generated by them.
2. Users in the group of "SCHOOL\_HEAD" can view and delete all reports in the repository.
3. Users in the group of "SYSTEM\_ADMIN" can view and delete all reports in the repository except the reports of FMP.
4. Specific Data Access Control for Reposts in Repository:
  - Assessment: The users in the group with the right to generate Assessment reports can view all such reports. However, only the creator can delete the report he / she generates.
  - Student: The users in the group with the right to generate Student reports can view all such reports. However, only the creator can delete the report he / she generates.
  - Security: The users in the group with the right to generate Student / Parent accounts and generate the "Account Generation Report" can view all such reports. However, only the creator can delete the report he / she generates.

- FMP: Users in any of the six built-in FMP user groups can view all the FMP reports. Only the users of user group “FMP\_ADMIN” can delete the FMP reports for housekeeping.
- Timetabling (TSI): The users of “STAFF” user type can view all the reports of Timetabling (TSI). Only users of the “TSI\_ADMIN” user group can delete the Timetabling (TSI) reports for housekeeping.

## 2.3 Report Function in Individual Module

### 2.3.1 Preview & Print

#### Function Description

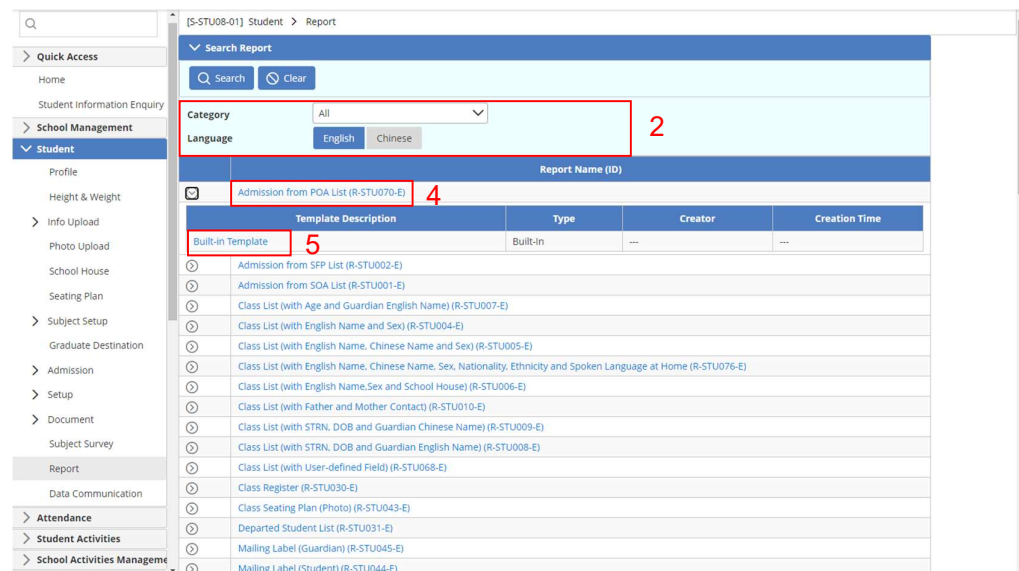
Each module has the **Report** function which allows users to produce reports of the module. Users can save, preview or print out the reports.

#### Pre-requisites

1. Report templates are available for generating the report.
2. Adobe Acrobat Reader and Microsoft Office are required to be installed into the computer to view the report produced.

#### User Procedures

1. Click **[Report]** under the module in the left menu.  
E.g. Click **[Student]** → **[Report]**.
2. Select the appropriate **Category** and **Language**.
3. Click the **[Search]** button to list reports under the category and language selected.
4. Click on the **Report Name(ID)** link to list the corresponding templates.
5. Click on the **Template Description** link to load the Print Criteria page.



The screenshot displays the 'Report' page for the 'Student' module. The left sidebar shows the 'Student' menu expanded. The main content area has a search bar and a 'Search Report' section with 'Category' set to 'All' and 'Language' set to 'English'. Below this is a table of report templates. The table has columns for 'Template Description', 'Type', 'Creator', and 'Creation Time'. The first row is highlighted, and its 'Report Name (ID)' is 'Admission from POA List (R-STU070-E)'. The 'Built-in Template' column header is also highlighted.

Report Name (ID)	Template Description	Type	Creator	Creation Time
Admission from POA List (R-STU070-E)	Built-in Template	Built-in	---	---
Admission from SFP List (R-STU002-E)				
Admission from SOA List (R-STU001-E)				
Class List (with Age and Guardian English Name) (R-STU007-E)				
Class List (with English Name and Sex) (R-STU004-E)				
Class List (with English Name, Chinese Name and Sex) (R-STU005-E)				
Class List (with English Name, Chinese Name, Sex, Nationality, Ethnicity and Spoken Language at Home) (R-STU076-E)				
Class List (with English Name, Sex and School House) (R-STU006-E)				
Class List (with Father and Mother Contact) (R-STU010-E)				
Class List (with STRN, DOB and Guardian Chinese Name) (R-STU009-E)				
Class List (with STRN, DOB and Guardian English Name) (R-STU008-E)				
Class List (with User-defined Field) (R-STU068-E)				
Class Register (R-STU030-E)				
Class Seating Plan (Photo) (R-STU043-E)				
Departed Student List (R-STU031-E)				
Mailing Label (Guardian) (R-STU045-E)				
Mailing Label (Student) (R-STU044-E)				

6. Select the **Print Criteria** required for producing the report. The **Print Criteria** are different for different report templates.
7. Select the **Format** of the report.
8. Click the **[Preview & Print]** button to produce the required report.

[S-STU08-70] Student > Report

8 **Preview & Print** Reset To File < Back

Admission from POA List (R-STU070-E) : Built-in Template

Please input the print criteria.

School Year	2020	School Session	AM
School Level	Primary	Admission Status	All Admitted Not Admitted
Allocation Type	Central Allocation	Print Excel in one-line per record	Yes No
Format	PDF WORD EXCEL RICHTEXT		

6

9. A pop-up window displaying the report in the selected format, e.g. Adobe Acrobat Reader application for PDF format. Use the application **[Save]** and **[Print]** buttons to save the report to the local machine and print out the report respectively.

 Post-effects

N/A

 Notes

1. Report can be displayed in four formats, i.e. PDF, WORD, RICHTEXT or EXCEL. The recommended format is PDF.
2. The data in the report is the on-line data in the CloudSAMS at the time when the **[Preview & Print]** button is clicked on.

### 2.3.2 To File

#### Function Description

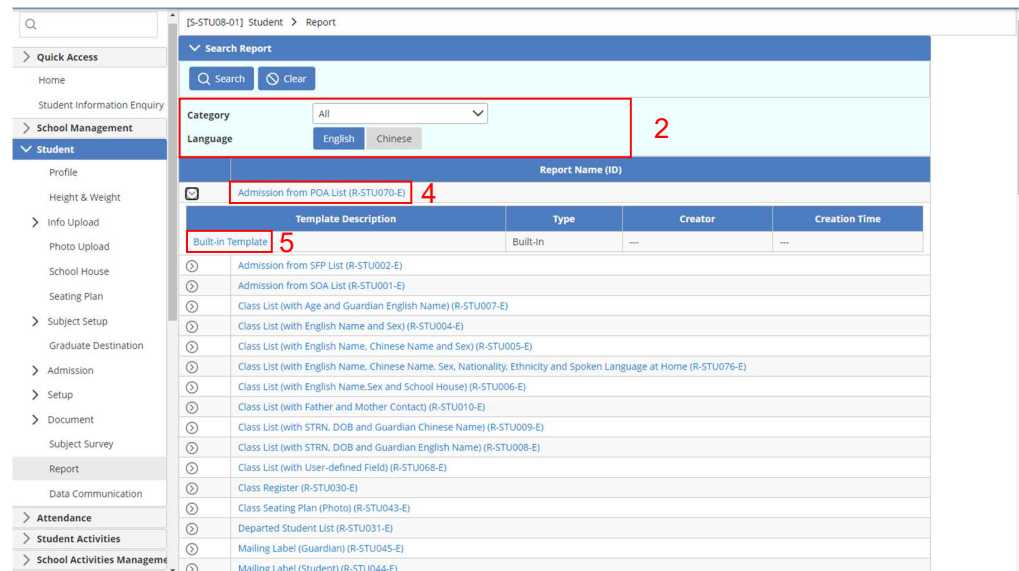
There are ten modules, i.e. Assessment, FMP, HKEAA, Institute Application, Security, SLP, Special Assessment, Student, Talent Databank and Timetabling (TSI), having the “To File” function which allows users to store the generated report in the report repository. Users may retrieve or delete the stored reports in the **[Repository]** function under Report Management Module.

#### Pre-requisites

N/A

#### User Procedures

1. Click **[Report]** under the module in the left menu.  
E.g. Click **[Student] → [Report]**.
2. Select the appropriate **Category** and **Language**.
3. Click the **[Search]** button to list reports under the category and language selected.
4. Click on the **Report Name(ID)** link to list the corresponding templates.
5. Click on the **Template Description** link to load the Print Criteria page.

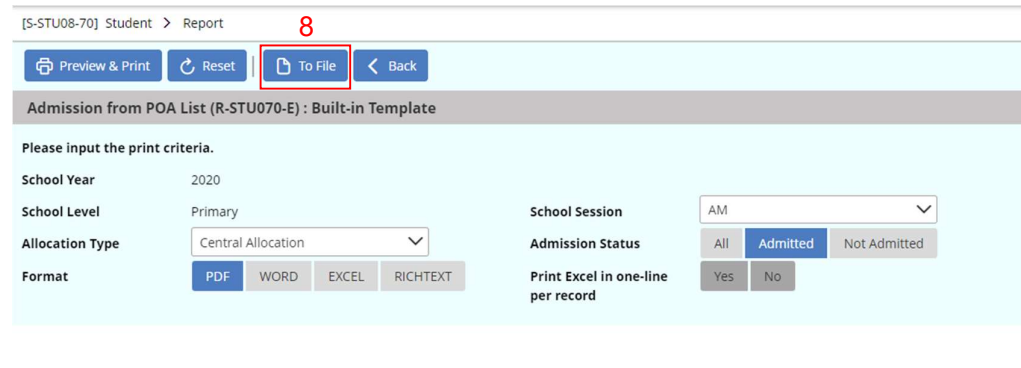


The screenshot displays the 'Report' management interface for a student. The left sidebar shows the 'Student' menu expanded. The main area has a search bar and filters for 'Category' (set to 'All') and 'Language' (set to 'English'). A search button is visible. Below the filters is a table of reports. The first report, 'Admission from POA List (R-STU070-E)', is highlighted with a red box and the number '4'. Below this report is a table of templates. The first template, 'Built-in Template', is highlighted with a red box and the number '5'. The table columns are 'Template Description', 'Type', 'Creator', and 'Creation Time'.

Template Description	Type	Creator	Creation Time
Built-in Template	Built-in	---	---
Admission from SFP List (R-STU002-E)			
Admission from SOA List (R-STU001-E)			
Class List (with Age and Guardian English Name) (R-STU007-E)			
Class List (with English Name and Sex) (R-STU004-E)			
Class List (with English Name, Chinese Name and Sex) (R-STU005-E)			
Class List (with English Name, Chinese Name, Sex, Nationality, Ethnicity and Spoken Language at Home) (R-STU076-E)			
Class List (with English Name, Sex and School House) (R-STU006-E)			
Class List (with Father and Mother Contact) (R-STU010-E)			
Class List (with STRN, DOB and Guardian Chinese Name) (R-STU009-E)			
Class List (with STRN, DOB and Guardian English Name) (R-STU008-E)			
Class List (with User-defined Field) (R-STU068-E)			
Class Register (R-STU030-E)			
Class Seating Plan (Photo) (R-STU043-E)			
Departed Student List (R-STU031-E)			
Mailing Label (Guardian) (R-STU045-E)			
Mailing Label (Student) (R-STU044-E)			

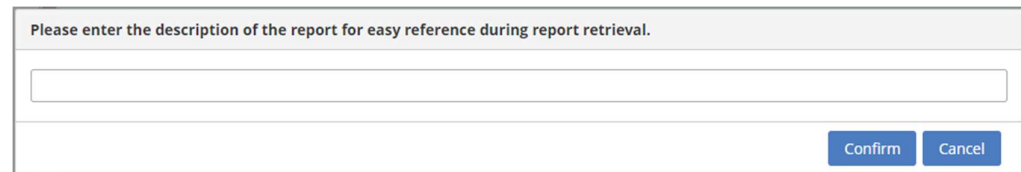


6. Select the **Print Criteria** required for producing the report. The **Print Criteria** are different for using different templates.
7. Select the **Format** of the report.
8. Click the **[To File]** button to generate the required report and store it in the report repository.



The screenshot shows a web interface for report management. At the top, there is a breadcrumb trail: "[S-STU08-70] Student > Report". A red circle with the number "8" highlights the "To File" button in the navigation bar. Below the navigation bar, the page title is "Admission from POA List (R-STU070-E) : Built-in Template". The main content area is titled "Please input the print criteria." and contains several form fields: "School Year" (2020), "School Level" (Primary), "Allocation Type" (Central Allocation), "School Session" (AM), "Admission Status" (All, Admitted, Not Admitted), and "Format" (PDF, WORD, EXCEL, RICHTEXT). There is also a "Print Excel in one-line per record" option with Yes/No buttons.

9. A window will be popped-up for users to enter the description of the report to be generated for easy reference during report retrieval from Repository in the module of Report Management.



The screenshot shows a pop-up window with the title "Please enter the description of the report for easy reference during report retrieval." It contains a single text input field and two buttons at the bottom right: "Confirm" and "Cancel".

10. After entering the description, click the **[Confirm]** button.




#### Post-effects

The message "Report has been submitted for generation. Please go to the "Repository" function of "Report Management" to view the generated report." will be displayed. A link for accessing the report repository function is available. (Refer 2.2 Report Repository)


 Notes

For security module, only the report “**Student / Parent Account Generation Report**” would be stored in Repository. This report is generated by the system automatically after the student or parent accounts have been batch created. Therefore, the **[To File]** button is not available in the Report function of Security module.

2.3.3 Access Control

 Function Description

Users can control the access right of report functions for each module in the Security Module. Users can grant access right to a user group.

 Pre-requisites

N/A

 User Procedures

1. Go into the Security module. Click **[Security]** → **[Access Control]** → **[User Group]**.
2. Select a user group.
3. Select **Report Management**, a new window as shown is displayed.
4. Grant the access right to the selected user group:
  - a. Check the **“View”** check box to allow the user group to view the report templates and reports stored in repository.
  - b. Check the **“Add”** check box to allow the user group to upload report template into the “Repository”.
  - c. Check the **“Delete”** check box to allow the user group to delete the report template and report stored in “Repository”.
  - d. Check the **“Execute”** check box to allow the user group to generate report in the corresponding module, e.g. “Student – Generate Report” for Student module. The report generated will then be stored in the Repository.

**Maintain Function Access Rights**

[S-SEC02-04] Security > Access Control > User Group > Access Right

Save Reset Assign Close

Group ID: SCH\_Staff Group Description: Staff  
 Module / Function: Report Management Chinese Group Description: 職員

Note(s):  
 \* Please refer to Report R-SEC003-E/C for details of each group's default access right setting.

Function	a View	Edit	b Add	c Delete	d Execute
Template - Maintain Template	<input checked="" type="checkbox"/>			<input type="checkbox"/>	
Template - Upload Template			<input type="checkbox"/>		
Repository	<input checked="" type="checkbox"/>			<input type="checkbox"/>	
* Assessment - Generate Report					<input checked="" type="checkbox"/>
* Student - Generate Report					<input checked="" type="checkbox"/>
* FMP - Generate Report					<input checked="" type="checkbox"/>
* Timetabling (TTL) - Generate Report					<input checked="" type="checkbox"/>
* Special Assessment - Generate Report					<input checked="" type="checkbox"/>
* Timetabling (TSI) - Generate Report					<input checked="" type="checkbox"/>

Note(s):  
 \* When "Execute" of this function has been checked, the "To File" button in the

No check box for the edit function as there is no Edit function in Report Management module.

5. Click the **[Save]** button.

 Post-effects

- If users' "Execute" right is revoked from a specific module e.g. Assessment module:
  - Uncheck the "Execute" box in the row of Assessment – Generate Report.

Maintain Function Access Rights

[S-SEC02-04] Security > Access Control > User Group > Access Right

Save Reset Assign Close

Group ID: SCH\_Staff Group Description: Staff  
Module / Function: Report Management Chinese Group Description: 職員

Notes(s):  
\* Please refer to Report R-SEC003-E/C for details of each group's default access right setting.

Function	View	Edit	Add	Delete	Execute
Template - Maintain Template	<input checked="" type="checkbox"/>			<input type="checkbox"/>	
Template - Upload Template			<input type="checkbox"/>		
Repository	<input checked="" type="checkbox"/>			<input type="checkbox"/>	
* Assessment - Generate Report					<input type="checkbox"/>
* Student - Generate Report	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>
* FMP - Generate Report	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>
* Timetabling (TTL) - Generate Report	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>
* Special Assessment - Generate Report	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>
* Timetabling (TSI) - Generate Report	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>

Notes(s):  
\* When "Execute" of this function has been checked, the "To File" button in the Report function of the corresponding module will be enabled for generating report and then storing in "Repository" of Report Management.

- In Assessment Module, the **[To File]** button in Report function is disabled.

[S-ASR35-65] Assessment > Report

Preview & Print Reset **To File** Back

Average Mark and Passing Percentage Analysis (By Subject/ Subject Component) (R-ASR053-E) : Built-in Template

Please input the print criteria.

Select Criteria

School Year: Current Year (2023)  
School Level: Primary  
School Session: AM  
Class Level: Primary 1  
Assessment / Term / Annual: T1A1

Comparison of Means (% with Chart): Require Not Require  
Select an Item for Comparison: T1

Subject / Subject Component

- Chinese Language (Chinese (Cantonese))
- Chinese Language - Chin Language (Chinese (Cantonese))
- Chinese Language - Chin Writing (Chinese (Cantonese))
- Chinese Language - Chin Dictation (Chinese (Cantonese))
- Chinese Language - Use of Chinese (Chinese (Cantonese))
- Chinese Language - Chin Reading (Chinese (Cantonese))
- Chinese Language - Chin Writing (Chinese (Cantonese))
- English Language (English)
- Ethics/ Religious Education (Chinese (Cantonese))
- General Studies (Chinese (Cantonese))

Select Format

Format: PDF WORD EXCEL RICHTEXT

2. If users are granted with the “Execute” right for a specific module e.g. Student module:
  - Check the “Execute” box in the row of Student – Generate Report.

Maintain Function Access Rights

[S-SEC02-04] Security > Access Control > User Group > Access Right

Save Reset Assign Close

Group ID: SCH\_Staff  
Group Description: Report Management  
Staff: 職員

Note(s):  
\* Please refer to Report R-SEC003-E/C for details of each group's default access right setting.

Function	View	Edit	Add	Delete	Execute
Template - Maintain Template	<input checked="" type="checkbox"/>			<input type="checkbox"/>	
Template - Upload Template			<input type="checkbox"/>		
Repository	<input checked="" type="checkbox"/>			<input type="checkbox"/>	
* Assessment - Generate Report					<input type="checkbox"/>
<b>* Student - Generate Report</b>					<input checked="" type="checkbox"/>
* FMP - Generate Report					<input checked="" type="checkbox"/>
* Timetabling (TTL) - Generate Report					<input checked="" type="checkbox"/>
* Special Assessment - Generate Report					<input checked="" type="checkbox"/>
* Timetabling (TSI) - Generate Report					<input checked="" type="checkbox"/>

Note(s):  
\* When "Execute" of this function has been checked, the "To File" button in the Report function of the corresponding module will be enabled for generating report and then storing in "Repository" of Report Management.

- In Student Module, the **[To File]** button in Report function is enabled, which allows users to generate report in student module. The report generated will then be stored in the Repository.

Home

[S-STU08-07] Student > Report

Preview & Print Reset **To File** Back

Class List (with Age and Guardian English Name) (R-STU007-E) : Built-in Template

Please input the print criteria.

School Year: 2020  
School Level: Primary  
School Session: AM  
Class Level: Primary 1  
Class Name: 1A  
Subject Group: All

Print Departed Student:  Include "Printing in Report" indicators are checked  Include all departed  Exclude all departed

Age Reference Date (DD/MM/YYYY): 14/12/2023

Format: PDF WORD EXCEL RICHTEXT

3. If users' "Add" right for **Template – Upload Template** is revoked:
  - Uncheck the "Add" box in **Template – Upload Template** row.

**Maintain Function Access Rights**

[S-SEC02-04] Security > Access Control > User Group > Access Right

Save Reset Assign Close

Group ID: SCH\_Staff  
Group Description: Report Management  
Chinese Group Description: 職員

Note(s):  
\* Please refer to Report R-SEC003-E/C for details of each group's default access right setting.

<input type="checkbox"/>	Function	View	Edit	Add	Delete	Execute
<input type="checkbox"/>	Template - Maintain Template	<input checked="" type="checkbox"/>			<input type="checkbox"/>	
<input type="checkbox"/>	Template - Upload Template			<input type="checkbox"/>		
<input type="checkbox"/>	Repository	<input checked="" type="checkbox"/>			<input type="checkbox"/>	
<input checked="" type="checkbox"/>	* Assessment - Generate Report					<input type="checkbox"/>
<input checked="" type="checkbox"/>	* Student - Generate Report					<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	* FMP - Generate Report					<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	* Timetabling (TTL) - Generate Report					<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	* Special Assessment - Generate Report					<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	* Timetabling (TSI) - Generate Report					<input checked="" type="checkbox"/>

Note(s):  
\* When "Execute" of this function has been checked, the "To File" button in the Report function of the corresponding module will be enabled for generating report and then storing in "Repository" of Report Management.

- In Template function of Report Management Module, the **Upload Template** tab is not displayed.

Lui Kee Secondary School Lui Kee Secondary School (RESTRICTED) (SIT - 3.17.6) Current School Year: 2020 15/12/2023 14:36:57 | testuser2 Logout

[S-RPT02-01] Report Management > Template > Maintain Template

**Maintain Templates**

Search Report

Module: All Modules  
Category: All Categories  
Type: All Built-in User-Defined  
Language: All English Chinese

4. If users are granted with “Add” right for **Template – Upload Template**:
  - Check the “Add” box in **Template – Upload Template** row.

Maintain Function Access Rights

[S-SEC02-04] Security > Access Control > User Group > Access Right

Save Reset Assign Close

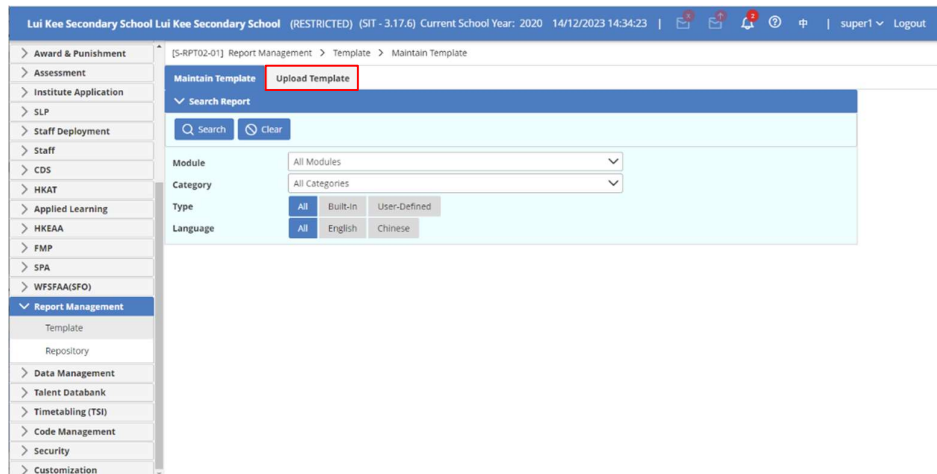
Group ID: SCH\_Staff      Group Description: Staff  
Module / Function: Report Management      Chinese Group Description: 職員

Note(s):  
\* Please refer to Report R-SEC003-E/C for details of each group's default access right setting.

<input type="checkbox"/>	Function	View	Edit	Add	Delete	Execute
<input type="checkbox"/>	Template - Maintain Template	<input checked="" type="checkbox"/>			<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Template - Upload Template			<input checked="" type="checkbox"/>		
<input type="checkbox"/>	Repository	<input checked="" type="checkbox"/>			<input type="checkbox"/>	
<input checked="" type="checkbox"/>	* Assessment - Generate Report					<input type="checkbox"/>
<input checked="" type="checkbox"/>	* Student - Generate Report					<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	* FMP - Generate Report					<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	* Timetabling (TTL) - Generate Report					<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	* Special Assessment - Generate Report					<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	* Timetabling (TSI) - Generate Report					<input checked="" type="checkbox"/>

Note(s):  
\* When "Execute" of this function has been checked, the "To File" button in the Report function of the corresponding module will be enabled for generating report and then storing in "Repository" of Report Management.

- In Template function of Report Management Module, the **Upload Template** tab will be displayed.



 Notes

1. Delete Template Access Right
  - Only user-defined templates can be deleted.
  - Only the uploader can delete the template uploaded by himself / herself. The only exception is the user of the SCHOOL\_HEAD or SYSTEM\_ADMIN group can delete all user-defined templates.
2. Access Right to Generate Report and Store in Repository
  - When the user group is granted with “Execute” right for the five specific modules, users are able to generate a report for that module. The report will then be stored in the report repository
  - Users can view and delete only the reports generated by them.
  - Users of the SCHOOL\_HEAD group can view and delete all reports stored in the Repository.
  - Users of the “SYSTEM\_ADMIN” group can view and delete all reports stored in the Repository except the reports of FMP.
  - Specific Data Access Control for Reports stored in Repository
    - Assessment: The users in the group with the right to generate Assessment reports can view all such reports. However, only the creator can delete the report he / she generates.
    - Student: The users in the group with the right to generate Student reports can view all such reports. However, only the creator can delete the report he / she generates.
    - Security: The users in the group with the right to generate Student / Parent accounts and generate the “Account Generation Report” can view all such reports. However, only the creator can delete the report he / she generates.
    - FMP: Users in any of the six built-in FMP user groups can view all the FMP reports. Only the users of user group “FMP\_ADMIN” can delete the FMP reports for housekeeping.
    - Timetabling (TSI): The users of the user type of “STAFF” can view all the reports of Timetabling (TSI). Only the “TSI\_ADMIN” can delete the Timetabling (TSI) reports for housekeeping.