

**E-platform for School Development
& Accountability (ESDA)
Version 5.2.x**

Operation Manual

November 2023

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About this Manual

This Operation Manual aims to provide a step-by-step reference for the operation of ESDA. The content of this manual is grouped and categorised by the main modules of ESDA and its respective operation tasks.

The target readers of this Operation Manual are System Administrator, Survey Administrator, KPM Data Administrator and those who are authorised to view ESDA reports.

There are eight chapters in this Operation Manual, including:

- Chapter 1 Introduction to ESDA
- Chapter 2 System Tools
- Chapter 3 User Management
- Chapter 4 Survey Management
- Chapter 5 Data Input
- Chapter 6 Report Management
- Chapter 7 Data Submission
- Chapter 8 School-based Survey Management

Contact Us

Education Bureau (EDB) welcomes schools to share with us their opinions and good practices in using ESDA. Please contact the Indicators Section of the EDB to express any views and suggestions, or to share experiences by phone, fax or email.

You can contact the Indicators Section of the EDB by the following methods for enquiring about the technical problem of ESDA.

- Telephone: 2892 6577 / 2892 6476 / 2892 6544 / 2892 6507
- Fax: 2119 9074
- Email: indicators@edb.gov.hk

Note: For enquiries by email or fax, please state the technical problem encountered, school name and contact person with phone number.

Chapter 1 Introduction to ESDA

ESDA facilitates schools' collection and management of their school self-evaluation (SSE) data for enhancing their effectiveness in SSE. ESDA can run on both the schools' Local Area Network (LAN) and Wide Area Network (i.e. Internet) with Google Chrome v100 or above.

ESDA v5.0.x, there are seven main component modules, namely, System Tools, User Management, Survey Management, Data Input, Report Management, Data Submission and School-based Survey Management.

1.1 About ESDA v5.0.x

This section describes the pre-installation work of System Administrator, such as understanding hardware requirements and gathering installation related information.

1.1.1 Suggested System Configuration

To ensure adequate performance of ESDA v5.0.x, the following configurations are suggested for the system.

	Basic Requirements	Suggested Configurations
Processor	2 core 64-bit (x64) processor	4 core 64-bit (x64) processor
Memory	4 GB RAM	16 GB RAM
Harddisk	128 GB	512 GB
Network Configuration	Support TCP/IP network with a static IP address	Support TCP/IP network with a static IP address
Operation System	Windows Server 2016 or above	Windows Server 2019 or above
Supported Internet Browser	Google Chrome version 87 or above Opera version 61 or above Safari version 14 or above Edge version 46 or above Firefox version 86 or above	Google Chrome version 87 or above Opera version 61 or above Safari version 14 or above Edge version 46 or above Firefox version 86 or above

Adequate system requirements depend on how to conduct surveys by schools. For example, the “Suggested Requirements” above can support students at a year level (almost 200 students) to complete an online survey simultaneously. Schools are suggested to use a faster processor and spare more memory if it is planned for more students to complete an online survey simultaneously.

In general, schools should install ESDA v5.0.x on Windows Server 2016 (or its latest version).

1.1.2 Installation of Necessary System Patch(es) and Browser

The EDB suggests that schools install the latest service pack and update security patches of Windows Server 2016 or above. For details, please refer to the Microsoft website (<http://windowsupdate.microsoft.com>).

The EDB suggests that schools use the browser of Google Chrome v100 or above.

1.1.3 Other Recommended Software

It is always recommended that schools install Anti-Virus software and update the latest virus signature on the computer in which ESDA is installed.

1.1.4 Verify Network Settings

Before installation, please ensure that “Port 443” is available. If the “Port 443” is used by another application, please close that application for installing ESDA v5.0.x. If the “Port 443” is set for other uses of the server, System Administrator may refer to Appendix 1 for setting up ESDA with other ports.

Before installation, please set the ESDA v5.0.x system recommended browser as the default browser of the server.

1.1.5 Reference website for Microsoft licensing

Windows Server 2016 supports two licensing modes, device-based and user-based (they are also known as Windows Device CALs and Windows User CALs). For scenarios where multiple users share a device within an organisation, Windows Device CALs save budgets and simplify management. On the other hand, Windows User CALs are the best choice if there are many users in your organisation who need access to the network from a variety of unknown devices, or if many employees have to access the network through multiple devices.

For details, please refer to the Microsoft License Agreement website (<http://www.microsoftvolumelicensing.com/userights/>).

1.2 About Installation

This session provides the steps to install ESDA in Windows Server 2016. In addition to Windows Server 2016, ESDA can also be installed in the Windows Server 2019 operating system. The three main tasks of installing ESDA are as follows:

- Pre-installation checklist
- Install ESDA
- Checking after installing ESDA

In ESDA v5.0.x, version upgrade is a built-in function, users only need to connect the ESDA v5.0.x system to the Internet and the upgrade procedure is almost automatic. For details, please refer to the Section 2.5.

1.2.1 ESDA Installation

If the preparatory tasks have been completed, System Administrator may start to install the ESDA.

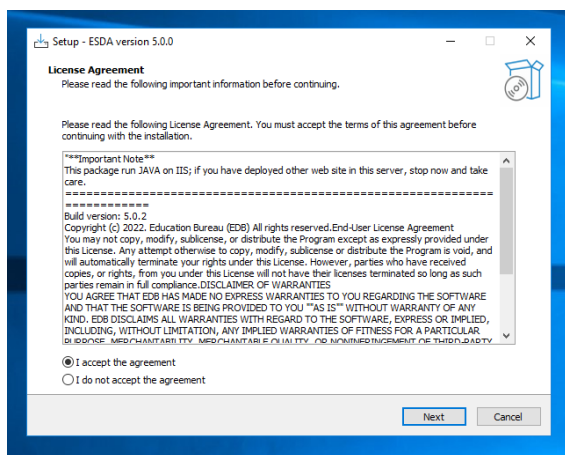
Step1: Download ESDA

- 1) Login to the Windows Server as an Administrator or as a user with administration rights.
- 2) Launch the browser and enter the URL <https://www.edb.gov.hk/en/sch-admin/sch-quality-assurance/performance-indicators/esda/download.html> for downloading the full ESDA installation programme (esda-v5.0.x.exe) to your computer.



Step 2: ESDA Installation

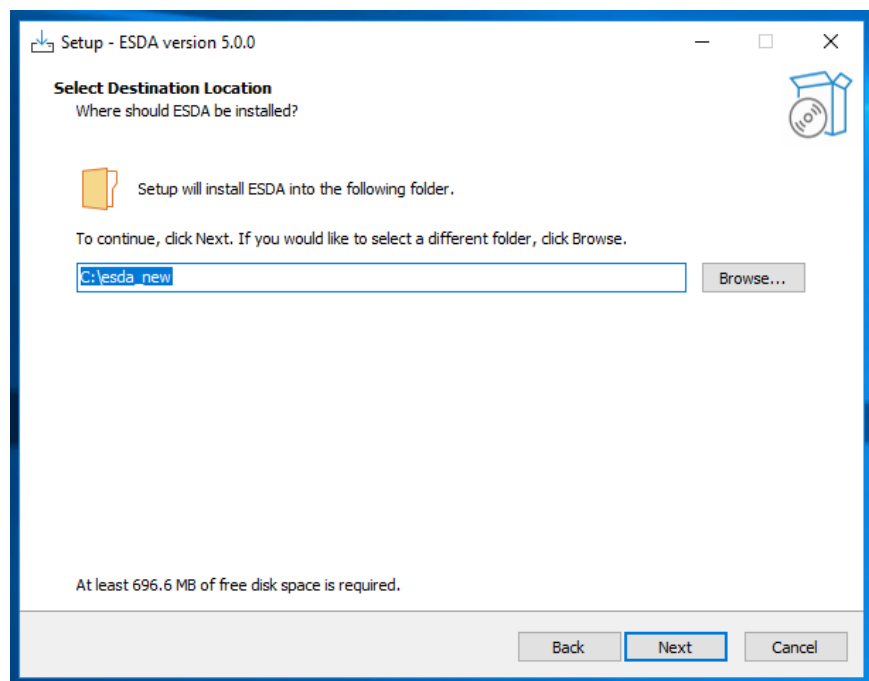
- 1) Double-click “esda-v5.0.x.exe”. Select “I accept the agreement” and click “Next”.



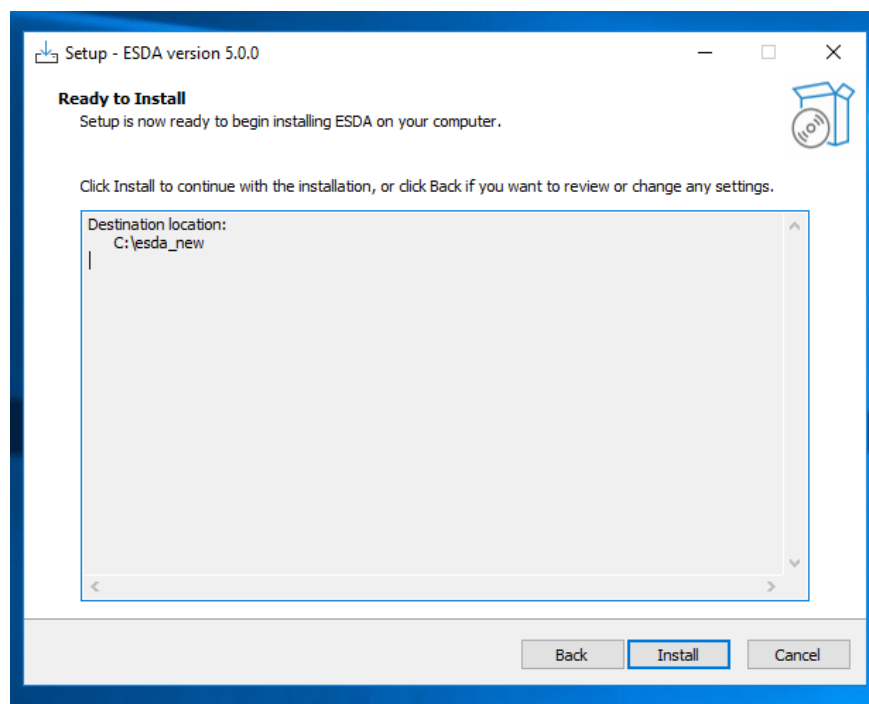
2) The ESDA v5.0.x will be installed in a default folder, click “Next”.

Note:

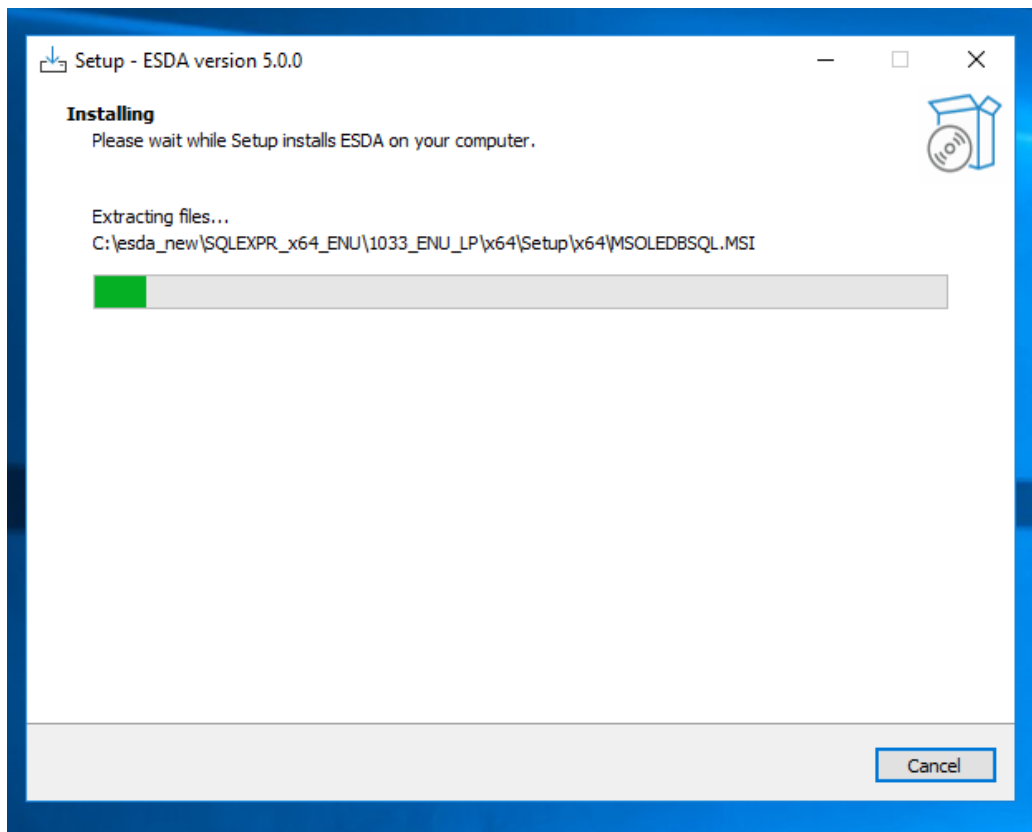
System Administrator can change the destination folder by clicking “Browse” button.



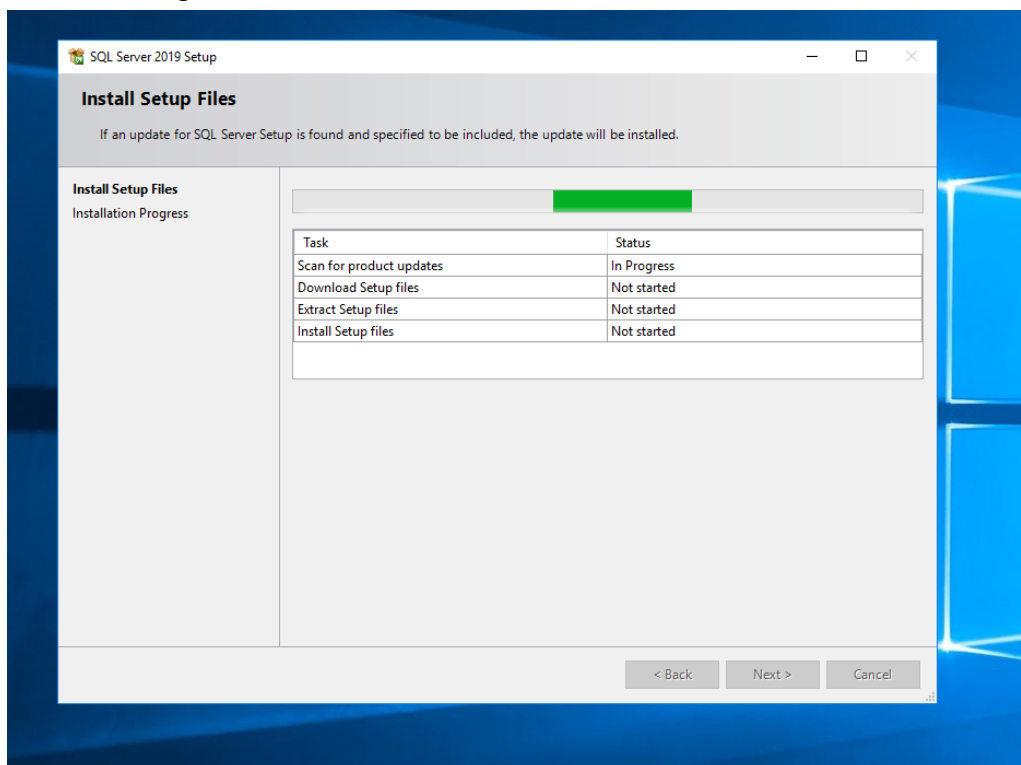
3) Click “Install” to start the installation.



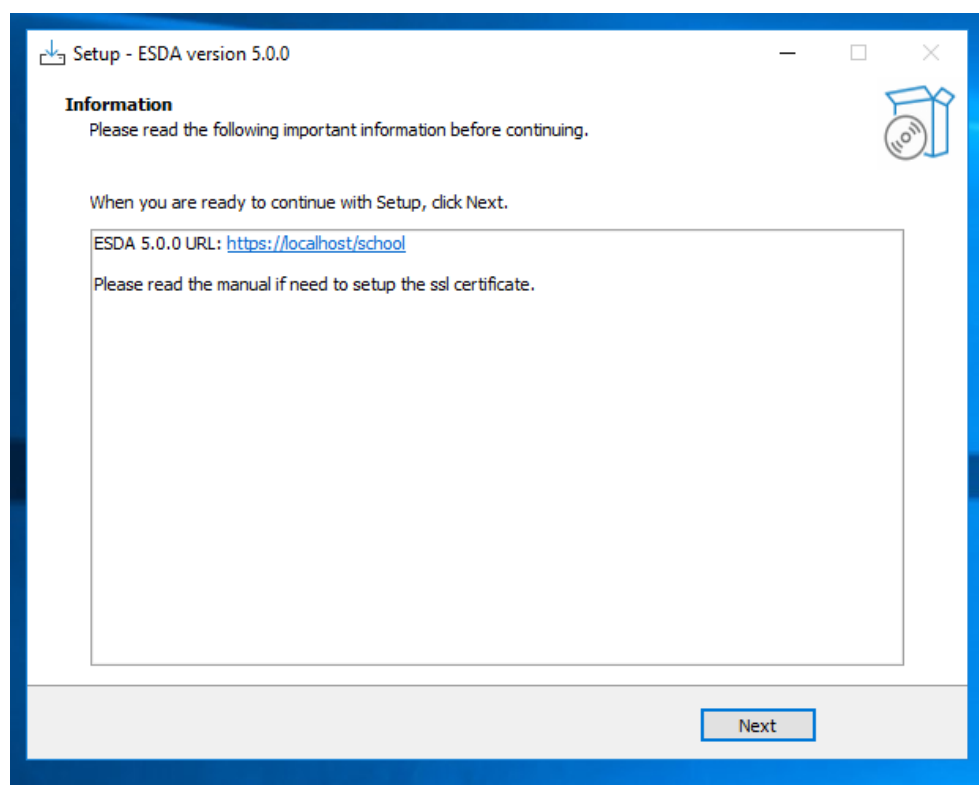
4) Installing ESDA v5.0.x.



5) Installing the MSSQL.

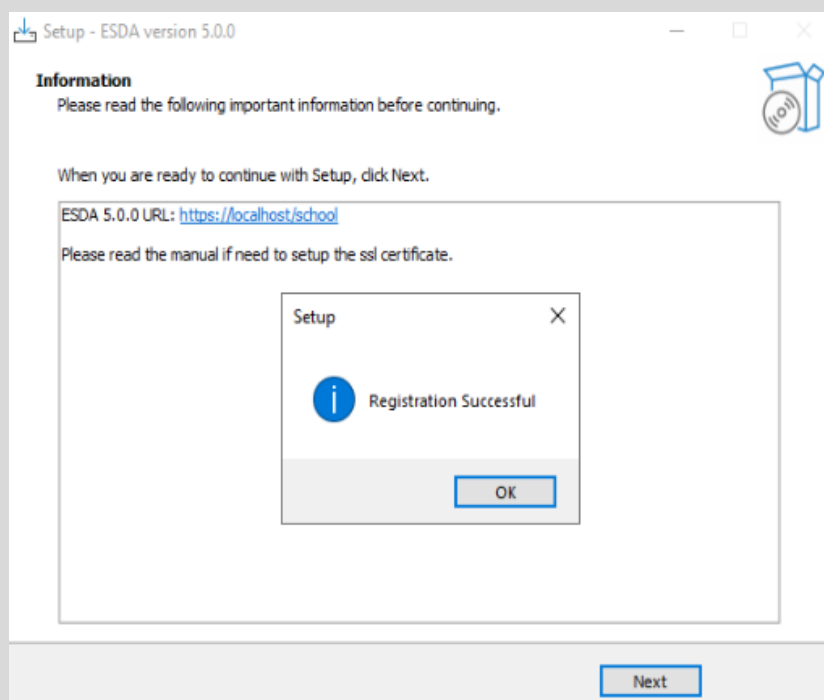


6) Click “Next” when the installation is completed.

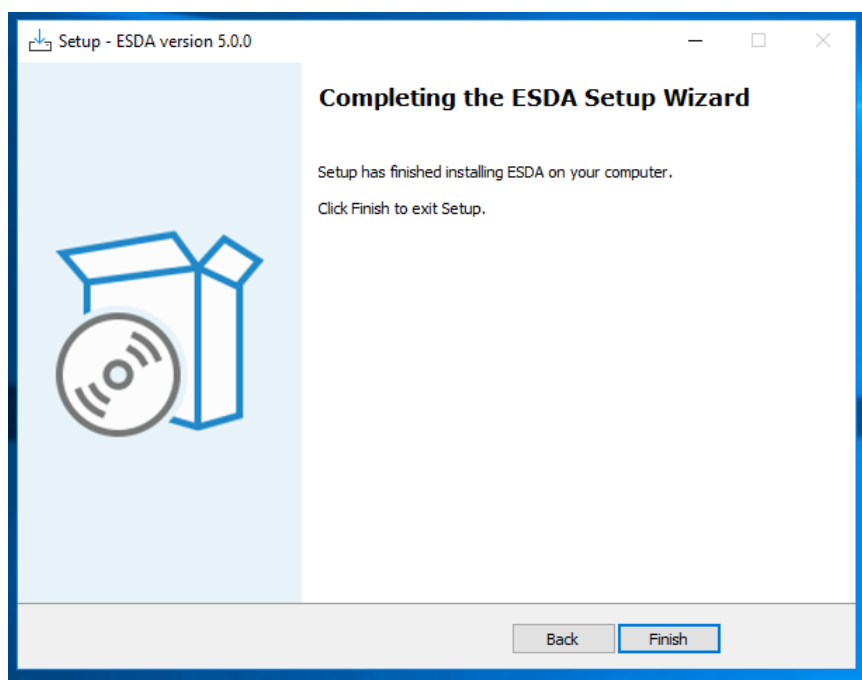


Note:

If ESDA v4.x.x is detected on the same server during installation, ESDA v5.0.x will be registered automatically.



- 7) Click “Finish” to close the installation programme.



- 8) Restart Windows Server after the installation is completed.

1.2.2 Set up e-Certificate

In order to set up ESDA v5.0.x to run on port 443, a valid e-Certificate is required. Schools can purchase a valid e-Certificate from a recognised Certification Authority (CA) or create a self-signed e-Certificate:

A) Using an e-Certificate purchased from a Certification Authority

- 1) **Make sure the purchased e-Certificate is in PKCS#12 format (the extension is “.p12”).** If the e-Certificate is not in PKCS#12 format, please use other tools to convert the e-Cert to the PKCS#12 format first, for example using openssl to convert the e-Cert from “.cert” file to “.p12” file. Please refer to its website <https://www.openssl.org/> for download and use openssl.
- 2) Use a System Administrator account to login to the server where the ESDA v5.0.x is installed.
- 3) Copy the e-Certificate in PKCS#12 format (e.g. “cert.p12”) to the server (e.g. C:\temp\cert.p12).
- 4) Open “Windows Command Prompt” and enter the following command to convert the e-Certificate in PKCS#12 format into “.keystore”.

```
"%JAVA_HOME%\bin\keytool" -importkeystore -srckeystore C:\temp\cert.p12 -srcstoretype PKCS12 -destkeystore C:\temp\keystore -deststoretype JKS
```

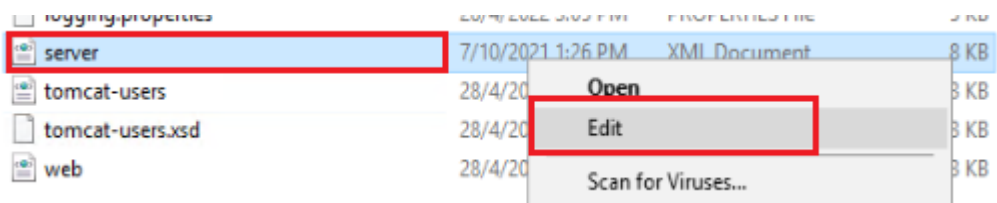

- 5) Enter a new password for the “.keystore” file, **the password should be the same as the password for the e-Certificate in PKCS#12 format.**

```
C:\Users\Administrator>"%JAVA_HOME%\bin\keytool" -importkeystore -srckeystore C:\temp\cert.p12 -srcstoretype PKCS12 -destkeystore C:\temp\.keystore -deststoretype JKS
Importing keystore C:\temp\cert.p12 to C:\temp\.keystore...
Enter destination keystore password:
Re-enter new password:
```

- 6) Enter the password for the e-Certificate in PKCS#12 format.

```
C:\Users\Administrator>"%JAVA_HOME%\bin\keytool" -importkeystore -srckeystore C:\temp\cert.p12 -srcstoretype PKCS12 -destkeystore C:\temp\.keystore -deststoretype JKS
Importing keystore C:\temp\cert.p12 to C:\temp\.keystore...
Enter destination keystore password:
Re-enter new password:
Enter source keystore password:
```

- 7) Please copy the certificate “.keystore” in the above path (e.g. C:\temp.keystore) to the installation path “C:\esda_new\apache-tomcat-9.0.xx\conf”.
- 8) Edit the Apache Tomcat configuration file (e.g. C:\esda_new\Apache_Tomcat_9.0\conf\server.xml) with a text editor (e.g. Notepad) and change the attribute “keystorePass” from “changeit” to the password entered in step 5.

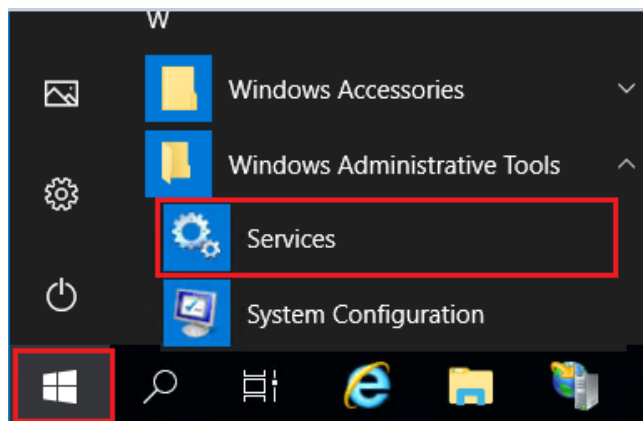


```
<Connector
protocol="org.apache.coyote.http11.Http11NioProtocol"
port="443" maxThreads="200"
scheme="https" secure="true" SSLEnabled="true"
keystoreFile="conf/.keystore" keystorePass="changeit"
clientAuth="false" sslProtocol="TLS" URIEncoding="UTF-8"/>
```

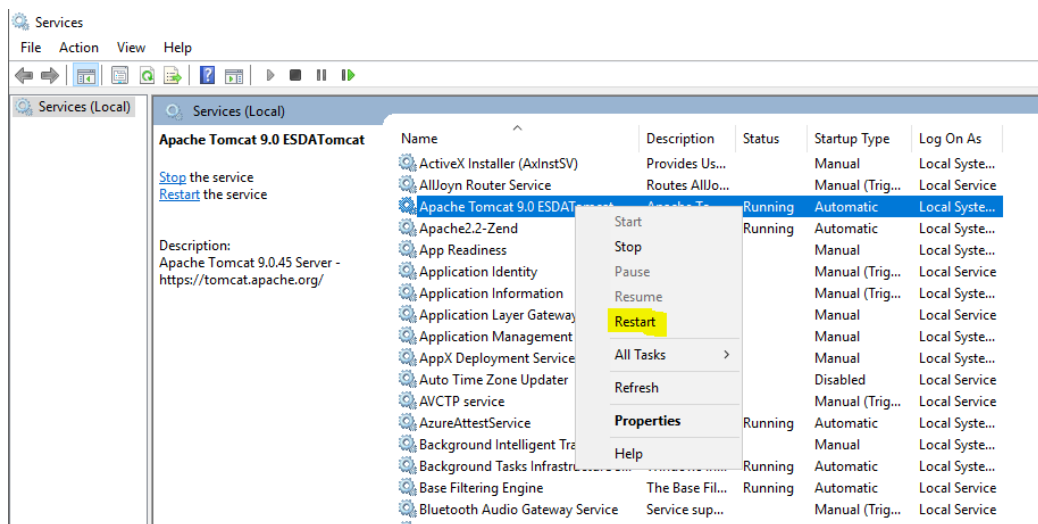
Note:

If you need to re-establish the e-Certificate in PKCS#12 format to “.keystore” file, please first delete the certificate “.keystore” in the path of step 7 and start over with step 4.

9) Open “Windows” and “Windows Administrative Tools”, then select “Services”.



10) Select “Apache Tomcat 9.0 ESDA” and click “Restart”.



B) Creating a self-signed e-Certificate

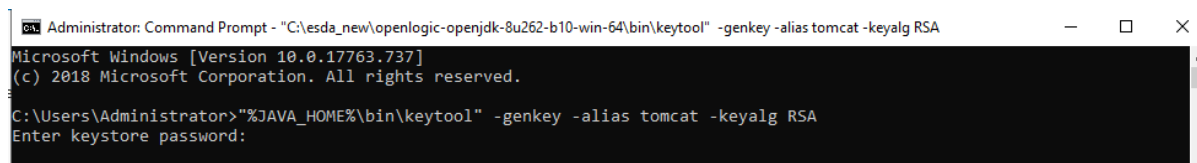
1) Login as an Administrator to the server where the ESDA v5.0.x system is installed.

2) Enter the following command at “Windows Command Prompt”:

```
"%JAVA_HOME%\bin\keytool" -genkey -alias tomcat -keyalg RSA -ext san=dns:< domain name >_
```

(e.g. `"%JAVA_HOME%\bin\keytool" -genkey -alias tomcat -keyalg RSA -ext san=dns:esda.schoola.edu _`)

Enter keystore password, e.g. password



3)

Enter the password for the steps above:
Enter the domain name, e.g. esda.schoola.edu
Enter the organizational unit, e.g. esda
Enter the organization, e.g. Testing Primary School A
Enter the city, e.g. Hong Kong
Enter the state, e.g. China
Enter the country code (two-letter), e.g. CN

```
C:\Users\Administrator>"%JAVA_HOME%\bin\keytool" -genkey -alias tomcat -keyalg RSA -ext san=dns:esda.schoola.edu
Enter keystore password:
Re-enter new password:
What is your first and last name?
[Unknown]: esda.schoola.edu
What is the name of your organizational unit?
[Unknown]: esda
What is the name of your organization?
[Unknown]: Testing Primary School A
What is the name of your City or Locality?
[Unknown]: Hong Kong
What is the name of your State or Province?
[Unknown]: China
What is the two-letter country code for this unit?
[Unknown]: CN
```

4)

Enter 'yes' to confirm the input.

```
C:\Users\Administrator>"%JAVA_HOME%\bin\keytool" -genkey -alias tomcat -keyalg RSA -ext san=dns:esda.schoola.edu
Enter keystore password:
Re-enter new password:
What is your first and last name?
[Unknown]: esda.schoola.edu
What is the name of your organizational unit?
[Unknown]: esda
What is the name of your organization?
[Unknown]: Testing Primary School A
What is the name of your City or Locality?
[Unknown]: Hong Kong
What is the name of your State or Province?
[Unknown]: China
What is the two-letter country code for this unit?
[Unknown]: CN
Is CN=esda.schoola.edu, OU=esda, O=Testing Primary School A, L=Hong Kong, ST=China, C=CN correct?
[no]: yes
```

5)

Enter the password for the steps above, e.g. password

```
C:\Users\Administrator>"%JAVA_HOME%\bin\keytool" -genkey -alias tomcat -keyalg RSA -ext san=dns:esda.schoola.edu
Enter keystore password:
Re-enter new password:
What is your first and last name?
[Unknown]: esda.schoola.edu
What is the name of your organizational unit?
[Unknown]: esda
What is the name of your organization?
[Unknown]: Testing Primary School A
What is the name of your City or Locality?
[Unknown]: Hong Kong
What is the name of your State or Province?
[Unknown]: China
What is the two-letter country code for this unit?
[Unknown]: CN
Is CN=esda.schoola.edu, OU=esda, O=Testing Primary School A, L=Hong Kong, ST=China, C=CN correct?
[no]: yes

Enter key password for <tomcat>
(RETURN if same as keystore password):
Re-enter new password:
```

6)

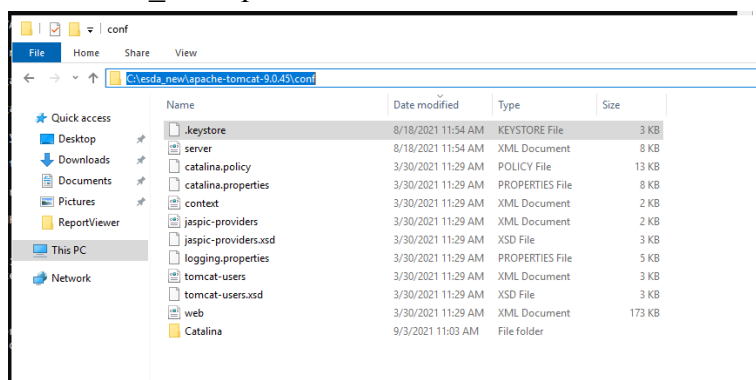
The certificate is generated in the above path (e.g. C:\Users\Administrator).

```
C:\Users\Administrator>"%JAVA_HOME%\bin\keytool" -genkey -alias tomcat -keyalg RSA -ext san=dns:esda.schoola.edu
Enter keystore password:
Re-enter new password:
What is your first and last name?
[Unknown]: esda.schoola.edu
What is the name of your organizational unit?
[Unknown]: esda
What is the name of your organization?
[Unknown]: Testing Primary School A
What is the name of your City or Locality?
[Unknown]: Hong Kong
What is the name of your State or Province?
[Unknown]: China
What is the two-letter country code for this unit?
[Unknown]: CN
Is CN=esda.schoola.edu, OU=esda, O=Testing Primary School A, L=Hong Kong, ST=China, C=CN correct?
[no]: yes

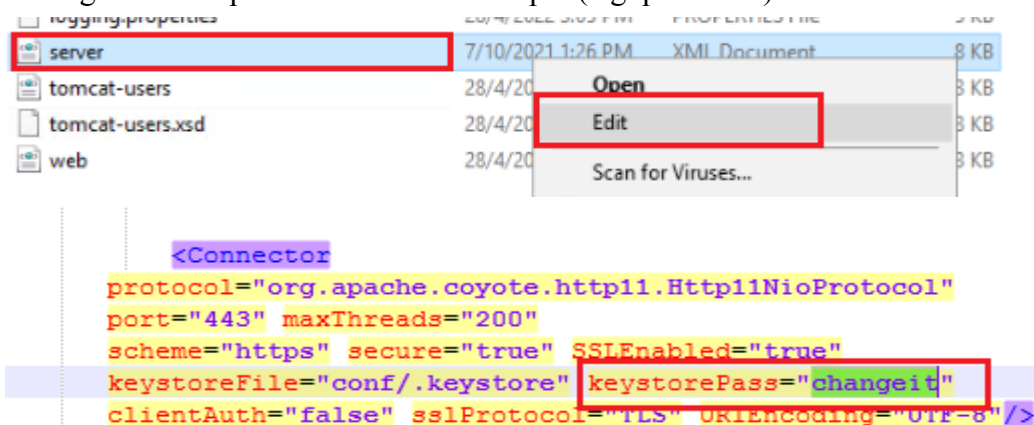
Enter key password for <tomcat>
(RETURN if same as keystore password):
Re-enter new password:

Warning:
The JKS keystore uses a proprietary format. It is recommended to migrate to PKCS12 which is an industry standard format
using "keytool -importkeystore -srckeystore C:\Users\Administrator\.keystore -destkeystore C:\Users\Administrator\.keystore
-deststoretype pkcs12".
```

7) Copy ".keystore" from the above path (e.g. C:\Users\Administrator\.keystore) to the installation path "C:\esda_new\apache-tomcat-9.0.xx\conf".



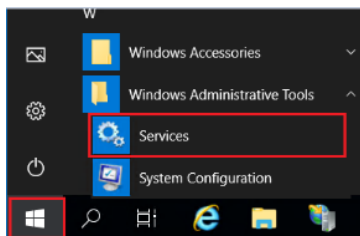
8) Edit Apache Tomcat configuration by using a word processor (e.g. Notepad) (e.g. "C:\esda_new\Apache_Tomcat_9.0\conf\server.xml"). Change the attribute "keystorePass" from "changeit" to the password entered in step 5 (e.g. password).



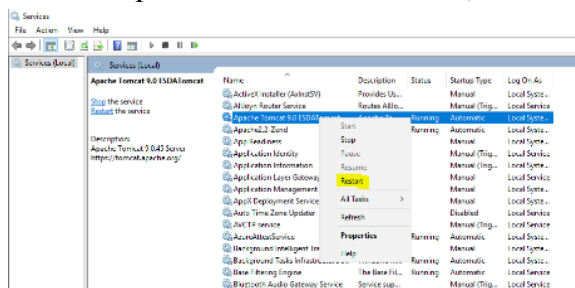
Note:

To re-establish a self-signed e-Certificate, please delete the e-Certificate “.keystore” generated in the path of step 6 and then restart from step 2.

9) Open “Windows” and select “Windows Administrative Tools”, then click “Services”.

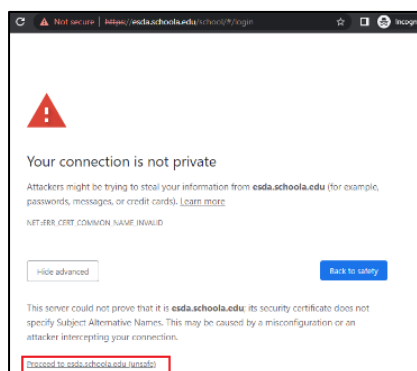


10) Choose “Apache Tomcat 9.0 ESDA”, then click “Restart”.



Note:

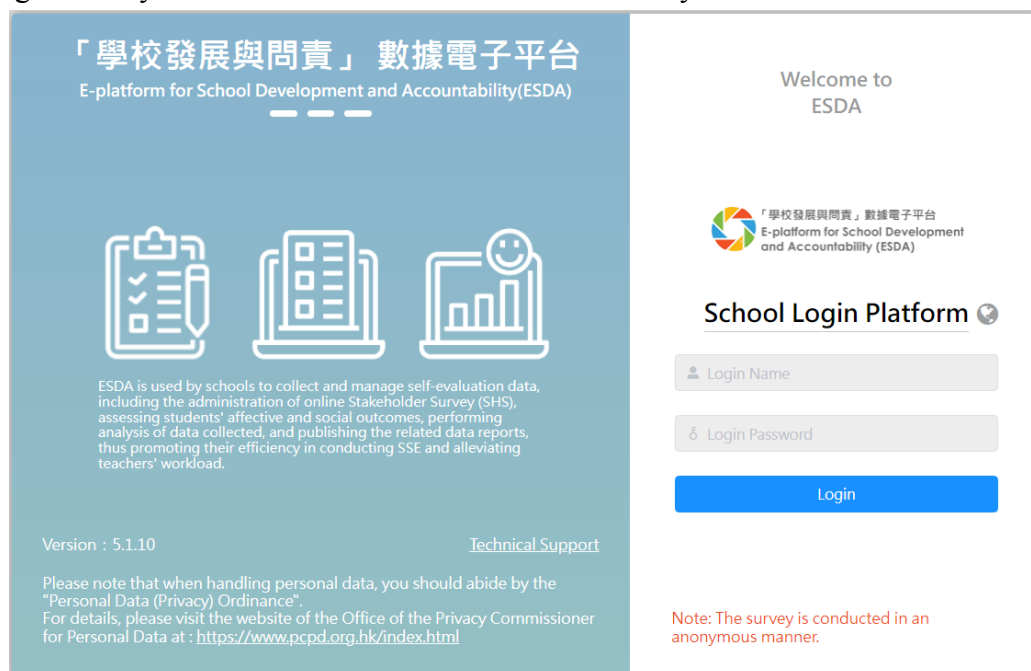
As the self-signed e-Certificate is not signed by a recognised CA, the website will be marked as “Not Secure” by browser when users enter ESDA website (for example, the following screen will appear when using Google Chrome). Users must click "Proceed to" to access the website or refer to the Appendix 2 of the Installation and Data Migration Guide to set up the self-signed e-Certificate at client side.



Please consider purchasing a valid e-Certificate from a recognised Certification Authority (“CA”) (e.g. Hongkong Post) to improve the security.

1.2.3 Testing after Installation

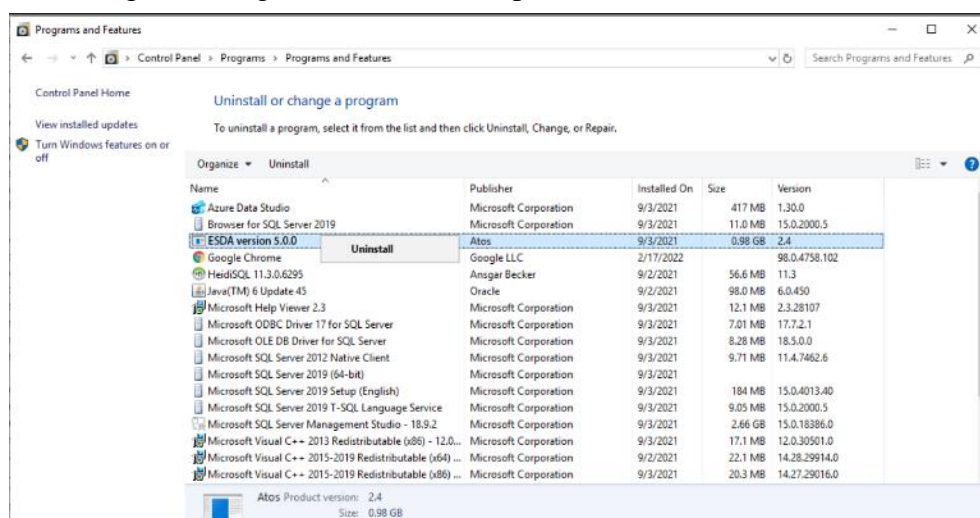
- 1) Login as an Administrator to the Windows Server where ESDA v5.0.x is installed.
- 2) Launch a supported browser (e.g. Google Chrome, Mozilla Firefox, Microsoft Edge, etc.) to “<https://127.0.0.1/school>” or “<https://<IP address or domain name>/school>”.
- 3) Login as a System Administrator to the ESDA v5.0.x system.



- 4) The default username of a System Administrator account is **admin** and the password is **P@ssw0rd**.
For security reason, please change the password of the default administrator account at once.
For details, please refer to Section 1.4.3.

1.2.4 Reinstall the ESDA

To reinstall ESDA v5.0.x, please uninstall the ESDA v5.0.x system at the “Programs” of the “Control Panel” before performing the installation steps in Section 1.2.



1.3 System Registration

1.3.1 System Registration

System Administrator have to complete the registration for ESDA v5.0.x before using any functions in the system. System Administrator should obtain a registration key from the Indicators Section of the EDB for system registration so that the ESDA system could start be used. If the ESDA v4.6.0 and ESDA v5.0.x systems are installed on the same server, ESDA v5.0.x will be registered automatically. If the ESDA v4.6.0 and ESDA v5.0.x systems are installed on different servers, please send an email to the Indicators Section of EDB (indicators@edb.gov.hk) to request a registration key and follow the steps below to system registration.

- 1) Mouse over “System Tool”, then click “System Setting”.
- 2) Select the school level in “School Level” section.
- 3) Enter the registration key.
- 4) Click “Register”.

Note:

The registration key of ESDA v4.x.x is not applicable to ESDA v5.0.x.

School Badge Upload

Upload Image of 250 x 100 Pixels or 250% ratio size [JPG/JPEG/PNG File Format]

System Registration

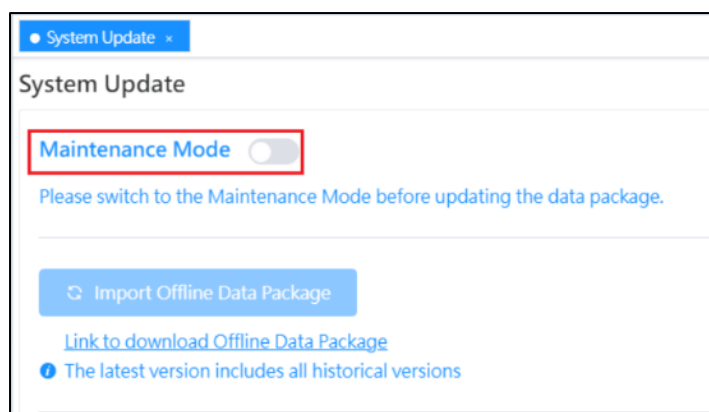
School Level

Registration Key - - - -

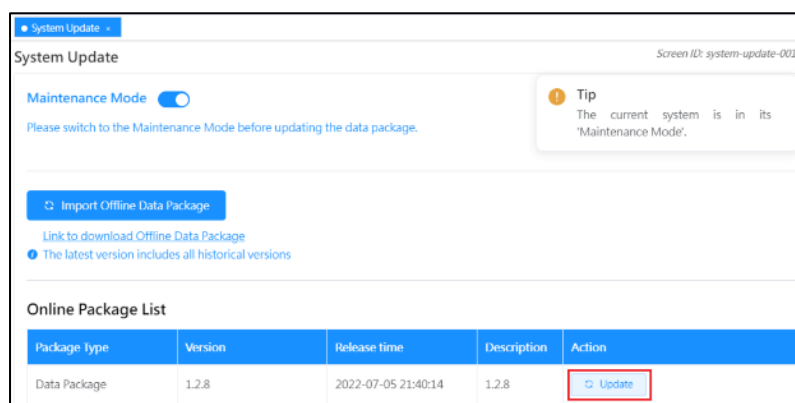
1.3.2 Automatic Version Control

Please conduct a system update after the registration of ESDA v5.0.x.

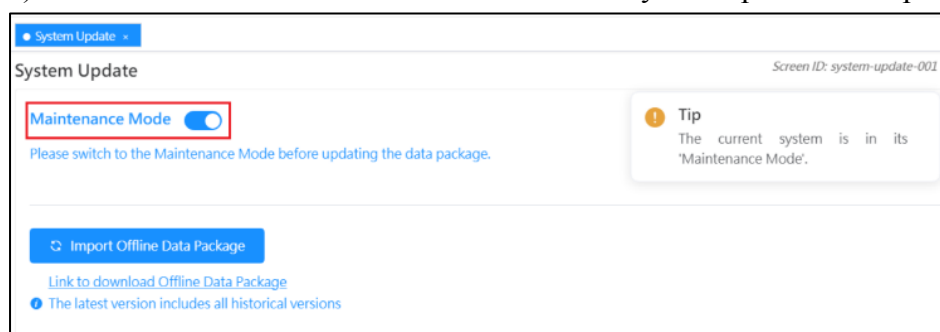
- 1) Mouse over “System Tools” and then click “System Update”.
- 2) Switch on the “Maintenance Mode”.



- 3) Click “Update” in the Online Package List section. “Updating” will be prompted when the system update is started. It takes about 15-20 minutes.



- 4) Switch off the “Maintenance Mode” after the system update is completed.



1.4 Login, Logout and Change Password

1.4.1 Login

- 1) To login ESDA v5.0.x, a user must enter his / her Login Name and Login Password.
- 2) Click “Login” or “Enter” key on the keyboard for authentication.

「學校發展與問責」數據電子平台
E-platform for School Development and Accountability (ESDA)

Welcome to ESDA

「學校發展與問責」數據電子平台
E-platform for School Development and Accountability (ESDA)

School Login Platform

Login Name

Login Password

Login

Note: The survey is conducted in an anonymous manner.

Version : 5.1.10 Technical Support

Please note that when handling personal data, you should abide by the "Personal Data (Privacy) Ordinance". For details, please visit the website of the Office of the Privacy Commissioner for Personal Data at : <https://www.pcpd.org.hk/index.html>

- 3) Read the statement. If agreed, click “Agree” to enter ESDA.

ATTENTION

Education Bureau seeks your cooperation to comply with the following protocol: The evaluation tools and data provided on ESDA are for school self-evaluation only and should not be used for any other unauthorised purposes. They are subject to intellectual property right protection. Any reproduction, adaptation, distribution or making available of such copyright work to the public is strictly prohibited.

注意

教育局希望學校能遵守以下的使用協議：「學校發展與問責」數據電子平台所提供的評估工具及數據，只供學校自評時使用，並不應使用於任何其他未經授權的用途。評估工具及數據受知識產權保護。嚴禁將該等版權作品複製、改編、分發或向公眾提供該等版權作品。

Agree 同意 Disagree 不同意

1.4.2 Logout

- 1) To logout ESDA, a user must click “User Name” at the top-right corner and then click “Log Out”.

Survey Management / Survey/Questionnaire Text Size CHAN Mazy

Survey/Questionnaire

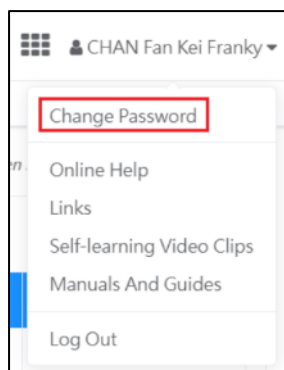
Pending survey

School Year	Questionnaire Title	Purpose	Start/End Date	Mode
		To help the school collect		

Log Out

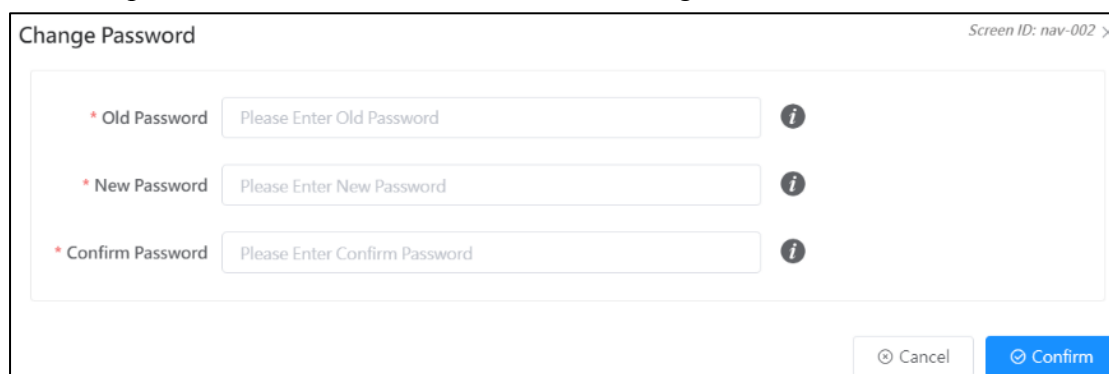
1.4.3 Change Password

1) Click “User Name” at the top-right corner and then click “Change Password”.



2) Enter “Old Password” and “New Password”, and then click “Confirm”.

3) The new password will be effective from the next login.

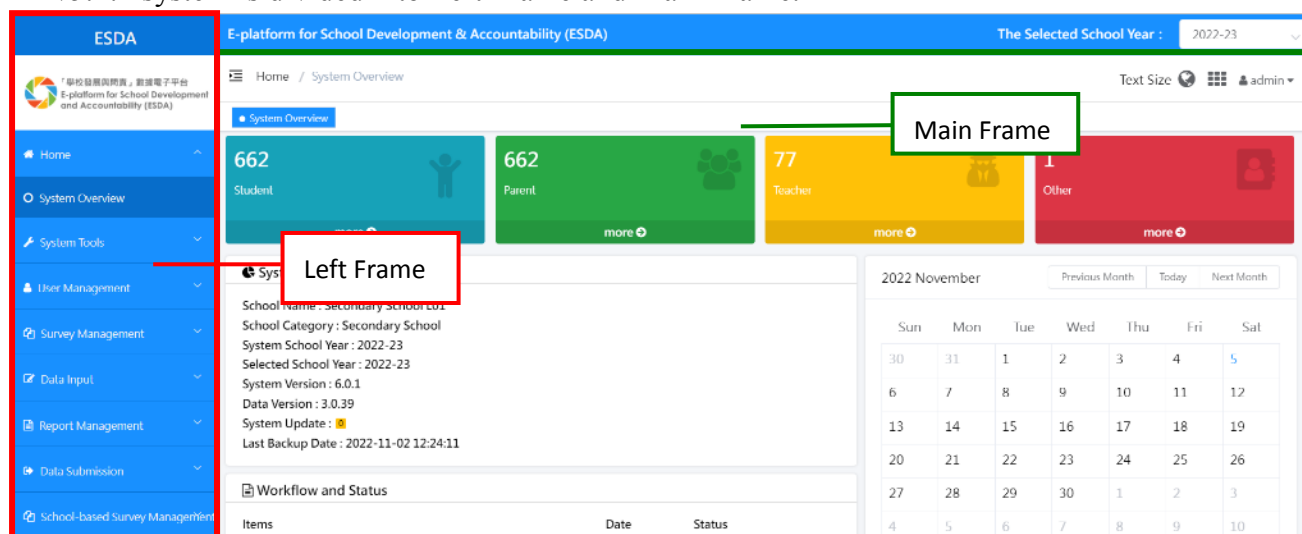
A screenshot of the "Change Password" form. The title "Change Password" is at the top left, and "Screen ID: nav-002" is at the top right. The form contains three input fields, each with a red asterisk and a label: "Old Password", "New Password", and "Confirm Password". Each field has a placeholder text "Please Enter [field name]" and an information icon (i) to its right. At the bottom right, there are two buttons: "Cancel" and "Confirm".

Note:

- 1) To meet the latest security requirement, the effective period for a user password is six months. Users will receive a mandatory request for changing the password and cannot re-use the previous eight passwords.
- 2) For schools publishing questionnaires via online mode, System Administrator may use the function “reset user password” to help users to reset the passwords before publishing the questionnaires, if necessary.

1.5 Navigating ESDA

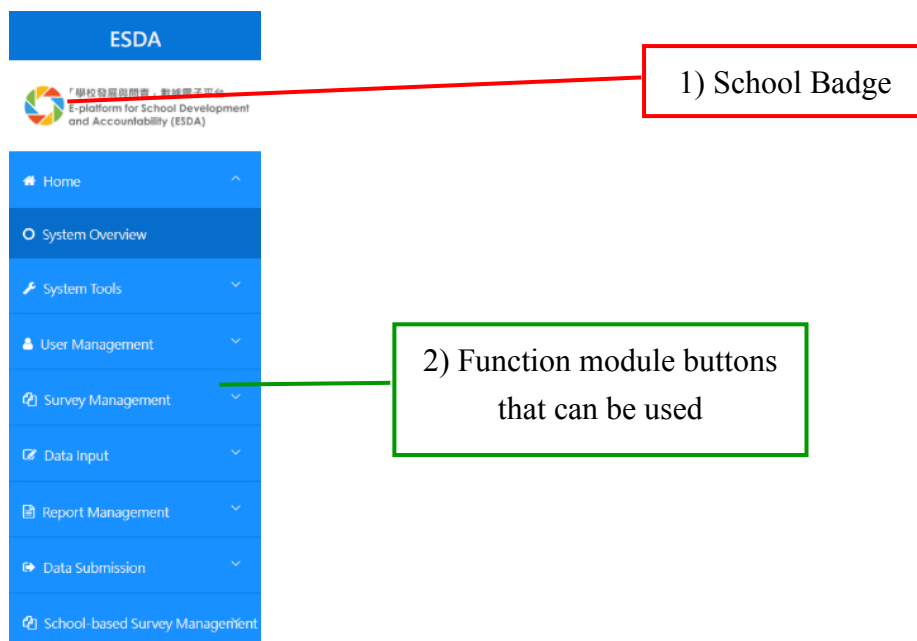
ESDA v5.1.x system is divided into Left Frame and Main Frame.



1.5.1 Left Frame

Left frame includes the following information:

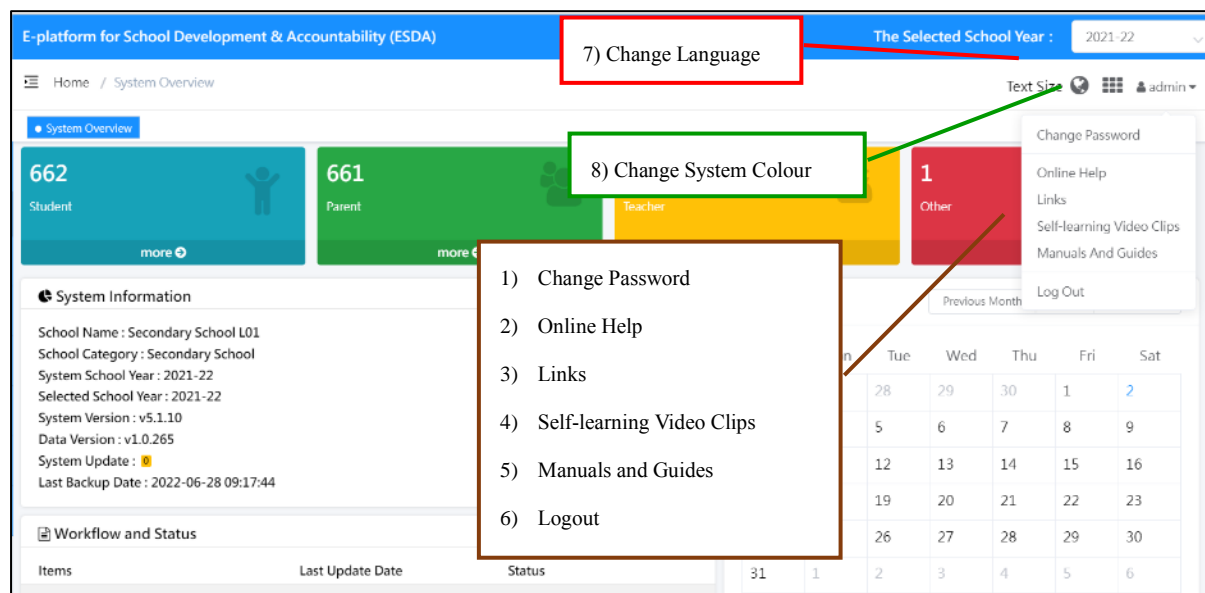
- 1) School Badge; 2) Function module buttons that can be used



1.5.2 Main Frame

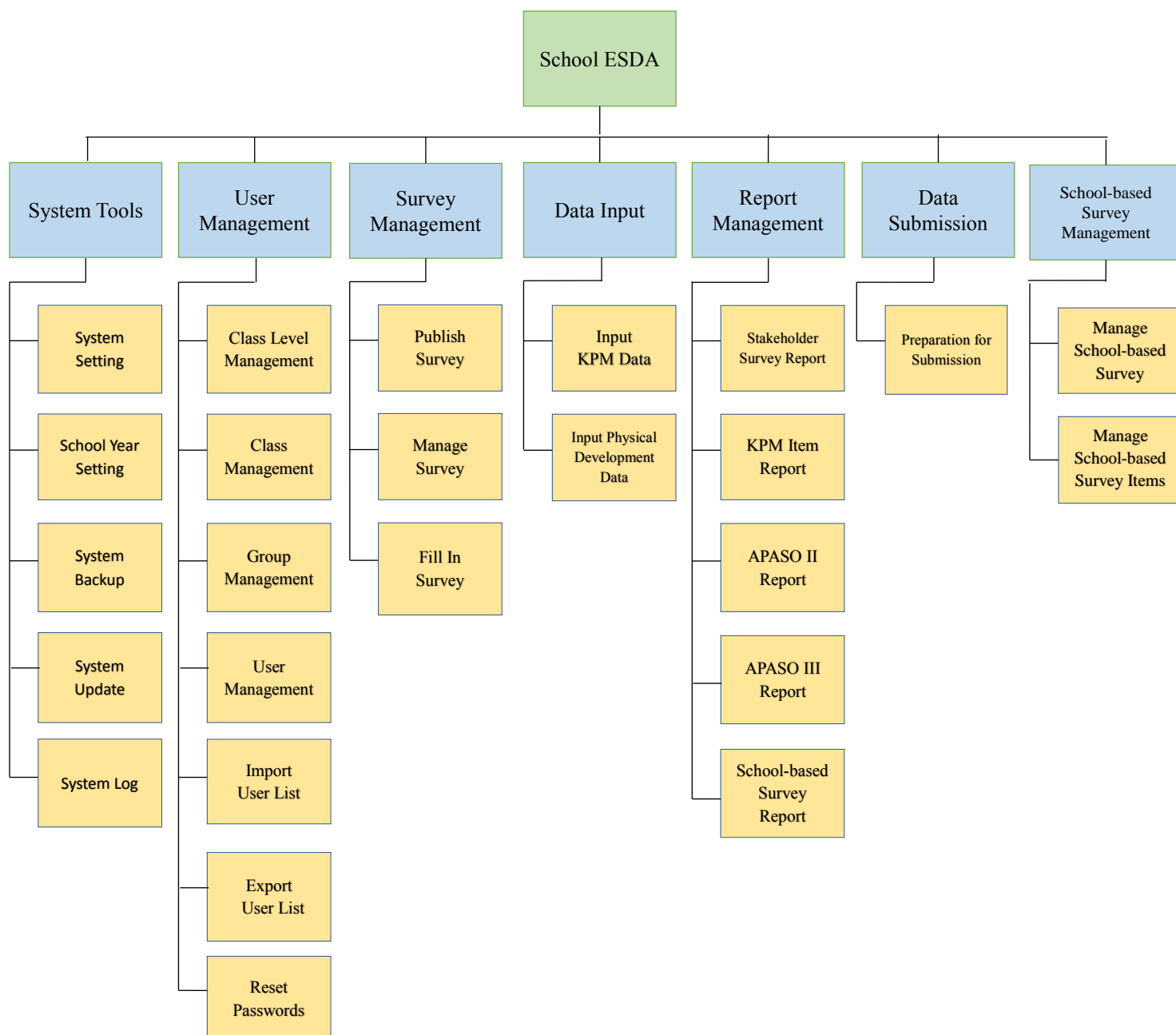
The main frame is for showing and processing data input or exporting data. The main frame includes the following information:

- 1) Change Password; 2) Online Help; 3) Links; 4) Self-learning Video Clips; 5) Manuals and Guides;
- 6) Logout; 7) Change Language; 8) Change System Colour



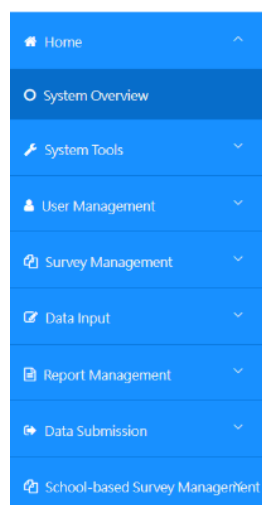
1.5.3 Functional Modules Views

There are seven major function modules under ESDA v5.1.x system.



1.5.4 Browse / Select Function

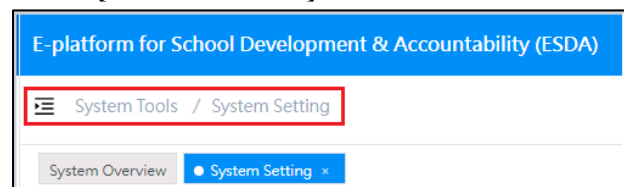
- 1) Mouse over the required function.
- 2) Click on the function name to access that function.



1.5.5 Traceable Direction Path

The traceable direction path is located at the top left-hand corner of Main Frame. It is designed to help users locate current location related to the module / function navigation path. The standard format is as follows:

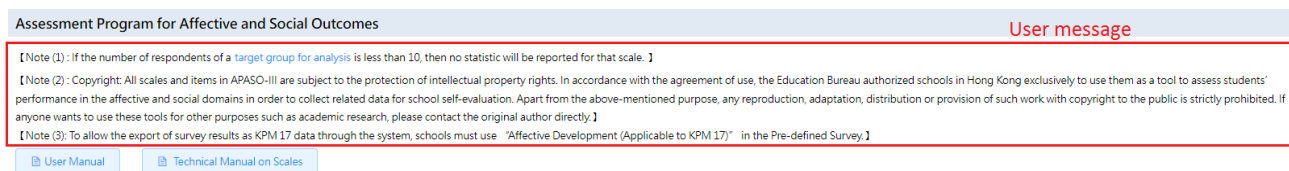
[Current Phase] / Function List / Function



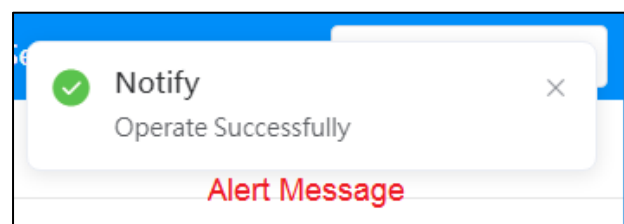
1.5.6 Messaging Function

In general, the system has three kinds of message.

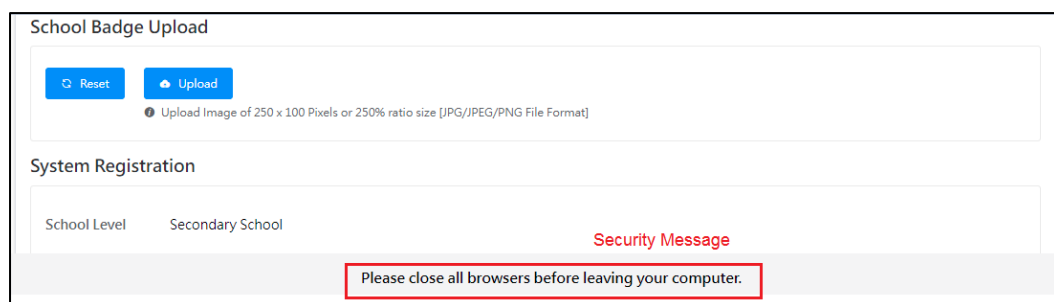
- 1) “User message” highlights the operation related information.



- 2) “Alert message” prompts when System Administrator login to ESDA for system related information.



3) “Security message” shows the general security information at the bottom of the page.



School Badge Upload

Upload Image of 250 x 100 Pixels or 250% ratio size [JPG/JPEG/PNG File Format]

System Registration

School Level Secondary School

Security Message

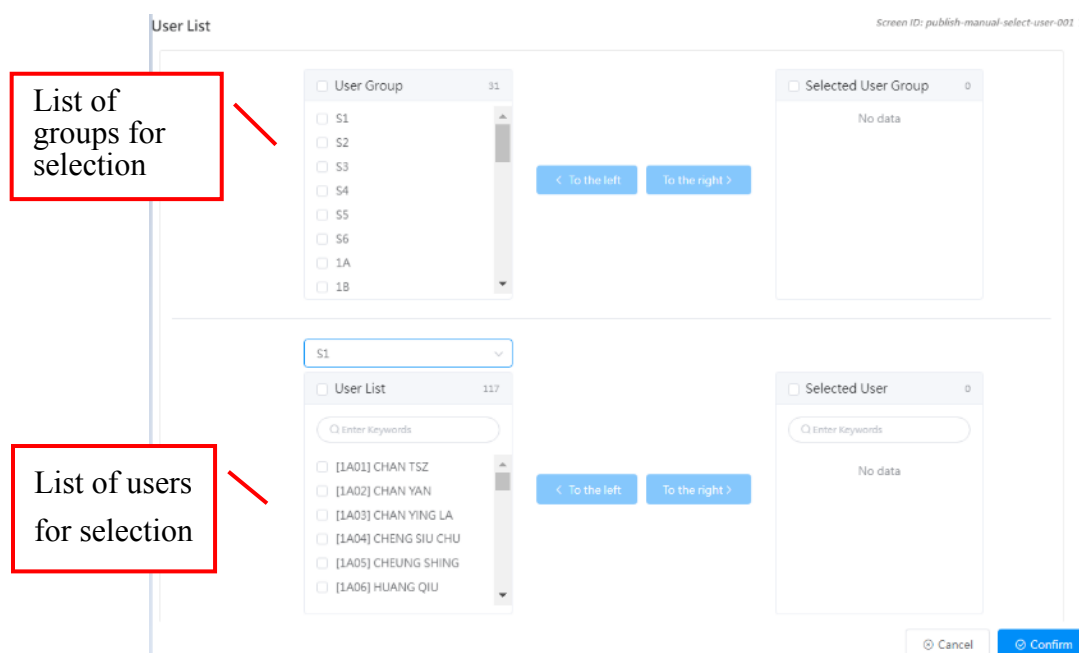
Please close all browsers before leaving your computer.

The EDB will disseminate user message, alert message, and security message through ESDA v5.1.x, System Administrator cannot change these messages.

1.6 Some Common Operations

1.6.1 Select groups and users from groups

It is used for selecting a combination of group(s) and some users of a group.



User List

Screen ID: publish-manual-select-user-001

☐ User Group 31

☐ S1
☐ S2
☐ S3
☐ S4
☐ S5
☐ S6
☐ 1A
☐ 1B

☐ Selected User Group 0

No data

< To the left To the right >

S1

☐ User List 117

Enter Keywords

☐ [1A01] CHAN TSZ
☐ [1A02] CHAN YAN
☐ [1A03] CHAN YING LA
☐ [1A04] CHENG SIU CHU
☐ [1A05] CHEUNG SHING
☐ [1A06] HUANG QIU

☐ Selected User 0

Enter Keywords

No data

< To the left To the right >

Cancel Confirm

List of groups for selection

List of users for selection

- 1) To select users from a group, check the group name and click “To the right >”.
- 2) To select all users from a group, check the “Select All” in the first row of “User List” and click “To the right >”.
- 3) To select the user name to be deleted from the “Selected User Group” panel and click “< To the left”.
- 4) Please follow the display on the above screen to select users from a group. Select the “Use Name” and click “To the right >”.
- 5) To select the user name to be deleted from the “Selected User” panel and click “< To the left”.

1.6.2 User Selection

This appears when selection of user operation is needed, such as selecting users from a Student group.

- 1) To select users in the group, browse the group first, then select the user and then click “To the right >”.
- 2) To delete a selected user, select users in the "Selected Users" list, then click “< To the left”.

1.6.3 The “Select All” checkbox

“Select-all” checkbox appears when multi-selection operation is needed.

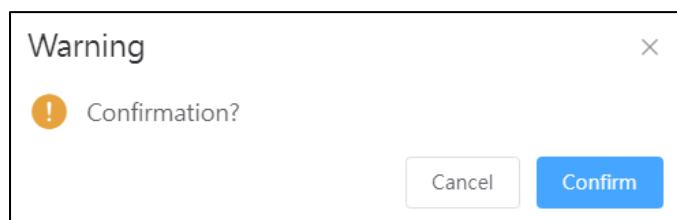
Once users check the “Select-all-checkbox” on the first row of the panel, all the check boxes below will be selected. However, if one or more of the checkbox(es) for the records below is / are unchecked, the “Select-all-checkbox” will be unchecked automatically.

1.6.4 Delete User

- 1) To delete a user, select the user from the relevant “User Type” and click “Delete”.

User Type	Login Name	Name (English)	Name (Chinese)	Group	Status	Actions
Student	ss211010	[1A01] CHAN TSZ	[1A01] 陳子	Student Group	Normal	<input checked="" type="checkbox"/> Edit
Student	ss211014	[1A02] CHAN YAN	[1A02] 陳妍	Student Group	Normal	<input type="checkbox"/> Edit

2) Click “Confirm” to confirm the deletion.



1.7 Suggested Scheduled Tasks

System Administrator should monitor the installed ESDA system regularly. The following table summarises the suggested tasks and schedules for reference:

	Tasks	Suggested Schedules	Reference
1	System Backup before upgrade	Before carrying out ESDA system upgrade	Section 2.4
2	Upgrade ESDA to the latest version	September or October; April or May (or when new upgrade package is available)	Section 2.1.4
3	Start a new school year	September or October	Section 2.3
4	Import Student user list	September or October	Section 3.6
5	Update Teacher user list	September or October	Section 3.6
6	Import data package	Before publishing stakeholder survey	Section 2.1.4
7	Scheduled System Backup	Daily	Section 2.4

Chapter 2 System Tools

2.1 About System Tools

The System Tools provides a set of tools for the System Administrator to manage the system-level setting (including System Setting, School Year Setting, System Backup, System Update, and System Log).

2.1.1 Administrative Procedures

The administrative work for ESDA can be grouped into four categories. This session describes the following administrative work.

Administrative Category	Specific Tasks
General administrative tasks (Session 2.1.2)	Stop and start ESDA, updating the school year setting, data archive and restore archived file.
User group and account administration (Session 3.1.3)	Create and maintain user groups and accounts to ensure that each user can login to ESDA and access relevant resources.
Backup and recovery (Sessions 2.4 & 2.7)	Perform regular backups for the restoration of ESDA data.
System version information (Session 2.5.1)	Monitor the installed ESDA versions and the latest version published by the EDB.

2.1.2 General Administrative Tasks

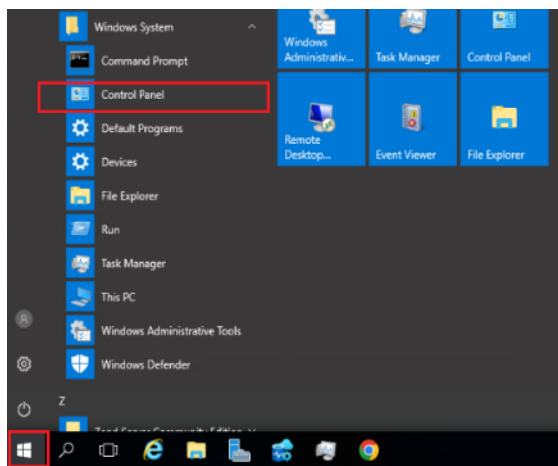
To maintain the system, some administrative tasks have to be performed regularly or annually. For example, the System Administrator should change the current school year setting before importing new user accounts in a new school year. To stop or start ESDA, the System Administrator needs to stop or start the Tomcat and MSSQL services. When the Tomcat and MSSQL services are stopped, no one can login to the ESDA.

2.1.2.1 Stop and Start ESDA

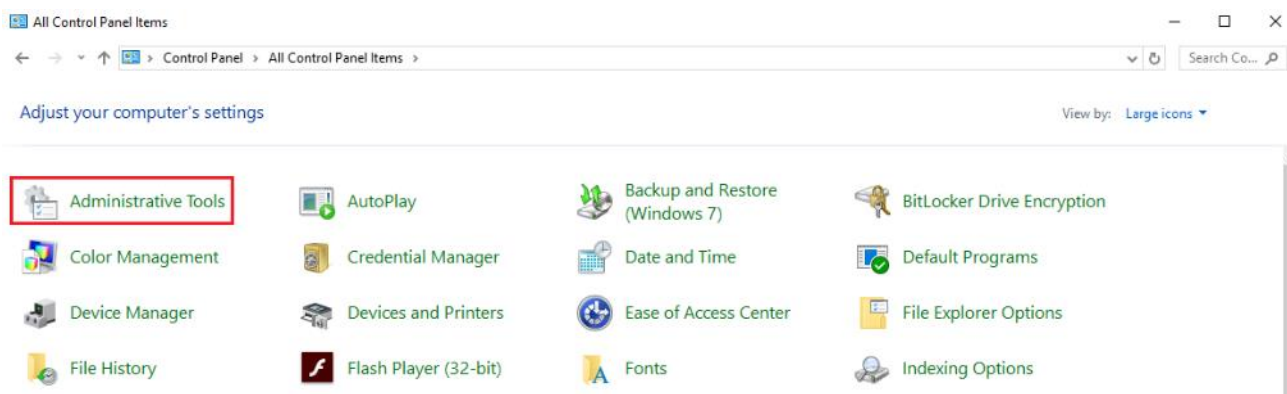
This section describes how to stop and start ESDA.

A) Stop ESDA

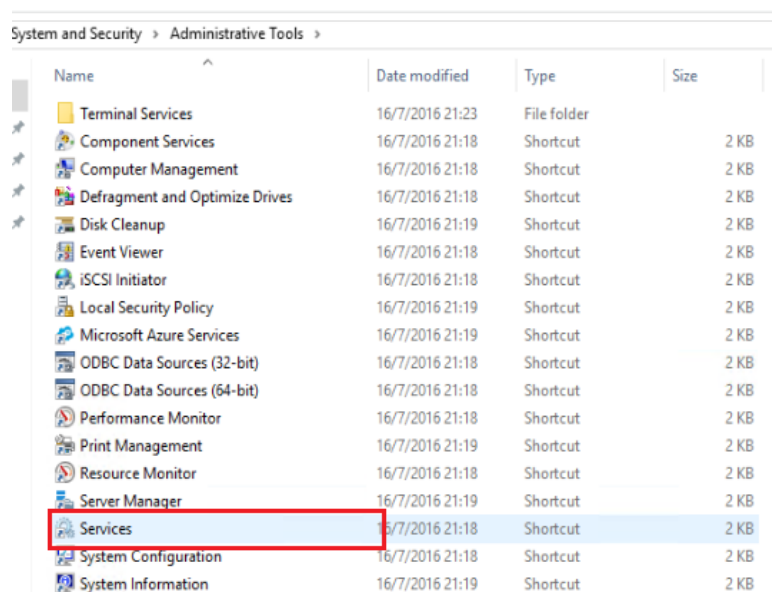
- 1) Click “Start” menu and click “Control Panel”



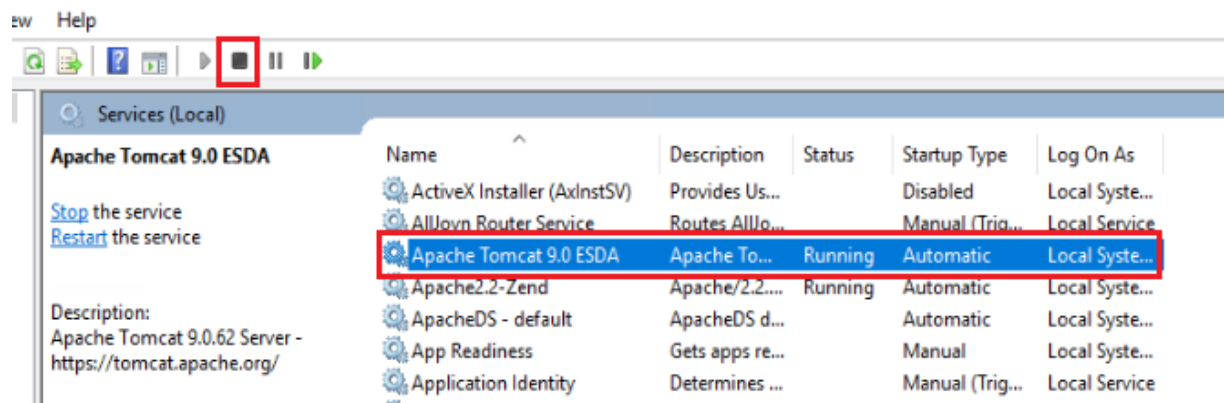
2) Click “Administrative Tools”.



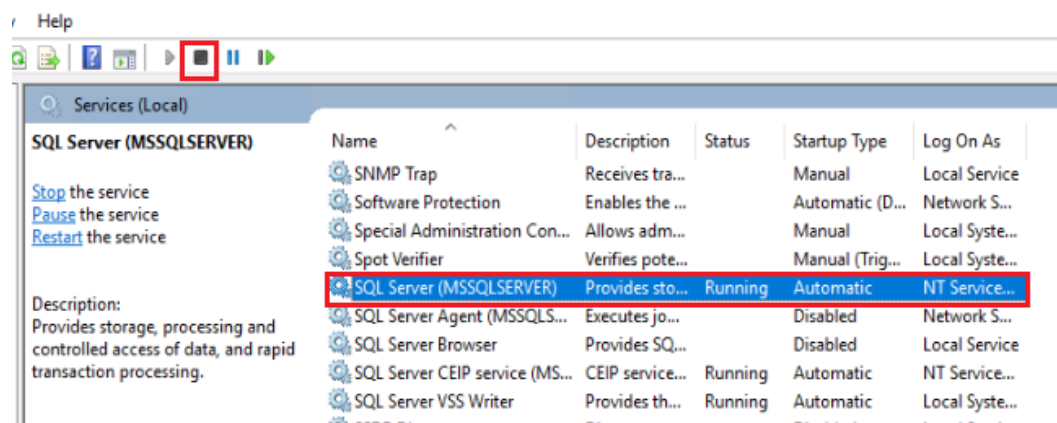
3) Click “Services”.



4) Click “Apache Tomcat 9.0 ESDA” services and “Stop” button.

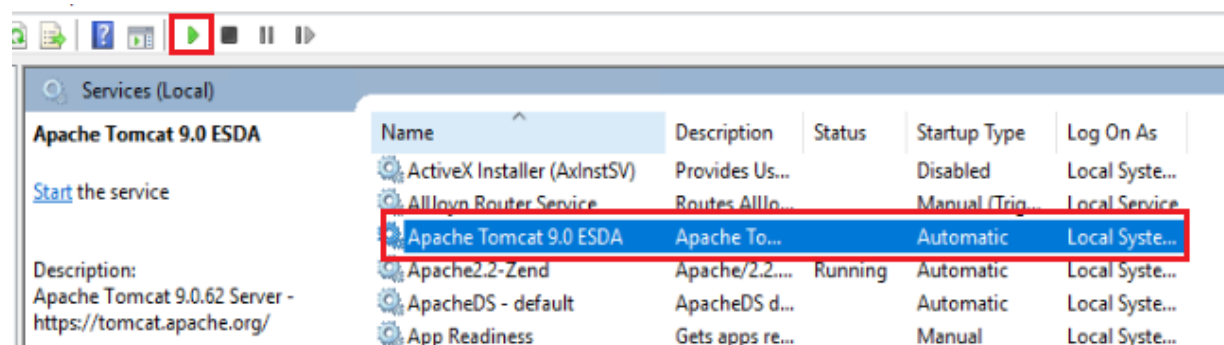


5) Click “SQL Server” services and click “Stop” button.

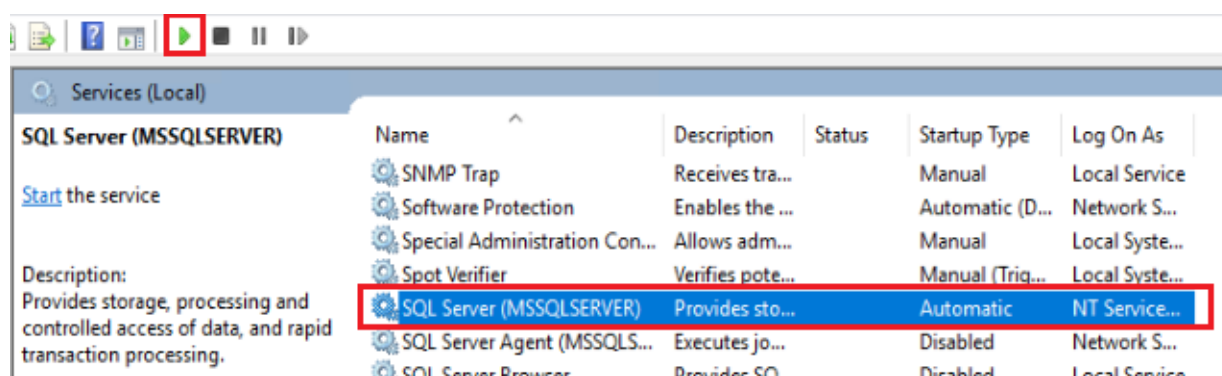


B) Start ESDA

1) Click “Apache Tomcat 9.0 ESDA” services and “Start” button.



2) Click “SQL Server” services and click “Start” button.

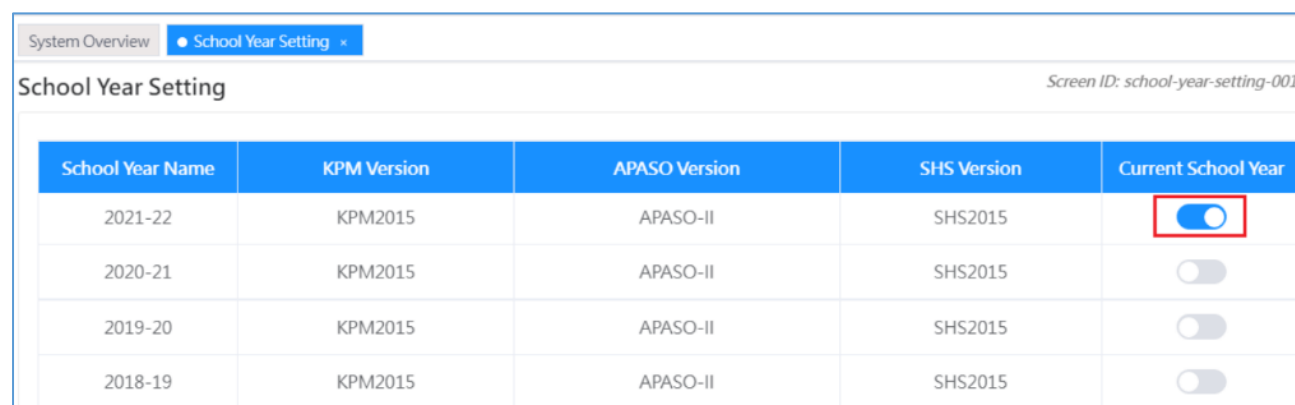


2.1.2.2 Updating School Year

Generally speaking, the System Administrator should update the school year before the commencement of the next school year. The System Administrator should set an appropriate school year as the “Current School Year”.

1) Mouse over “System Tools” and then click “School Year Setting”.

2) Select an appropriate school year as “Current School Year”.



When the system is set for a new school year, all student accounts from the last school year will be automatically changed to inactive. Therefore, the following tasks must be carried out before the start of a new school year:

- Make a full backup of the ESDA system and data;
- Complete all published questionnaires;
- Print all survey reports and keep softcopy (if necessary);
- Prepare for system restore;
- Set new school year;
- Import student record of the new school year;
- Update teacher record of the new school year;
- Import data package of the new school year.

Warning:

Once the system has been set for the new school year and student records have been imported into the new school year, there is no other way to restore the system to its previous status unless restore the system.

2.1.3 Windows Event Log Monitoring

The Windows Server 2016 provides a tool called “Event Viewer”. With the Event Viewer, System Administrator can monitor events recorded in event logs. According to the event logs, System Administrator can understand the system workload and the corresponding effect on the system's resources. The event logs assist System Administrator to diagnose problems. According to the information from Microsoft (<http://www.microsoft.com>), the recommended procedures are:

- 1) Login Windows Server 2016 as an Administrator.
- 2) Click Start → Control Panel → Administrative Tools → Event Viewer.
- 3) To open Event Viewer and to refresh the view, on the **Action** menu click **Refresh**.

2.2 System Setting

System Setting for ESDA version v5.0.x is rendered to achieve the best presentation as well as easy management.

[illegible]

- 1) Mouse over “System Tools” and then click “System Setting”.
- 2) Click the corresponding button to change the settings.
- 3) For details about each function button, please refer to the following sections:

Section	Setting Buttons	Description
2.2.1	Basic Information	Input and update school name, school session, System Administrator information and teacher in charge information.
2.2.2	School Badge	Upload school badge
2.2.3	Advanced System Setting	Change the display of online help and school year version setting

2.2.1 Basic Information

Schools can enter and update the school name, System Administrator information, teacher in charge information, school number (SCRN) and school session.

The screenshot displays the 'System Setting' window with the 'Basic Information' tab selected. The interface includes fields for School Name (Eng), School Name (Chi), Name of Administrator, Name of teacher in charge, Phone of Administrator, Phone of teacher in charge, Email of Administrator, Email of teacher in charge, SCRN, and Session. Below these are read-only fields for Current School Year (2021-22), School Level (Secondary School), Current KPM Version (KPM2015), Current APASO Version (APASO-II), and Current SHS Version (SHS2015). At the bottom right are 'Cancel' and 'Save' buttons.

System Setting					
Basic Information		Advanced System Setting		System Version Information	
School Name (Eng)	School Name (Eng) 0/200	School Name (Chi)	School Name (Chi) 0/200		
Name of Administrator	Name of Administrator 0/200	Name of teacher in charge	Name of teacher 0/200		
Phone of Administrator	Phone of Administrator 0/200	Phone of teacher in charge	Phone of teacher 0/200		
Email of Administrator	Email of Administrator 0/200	Email of teacher in charge	Email of teacher in charge 0/200		
SCRN	SCRN 0/200	Session	Select		
Current School Year	2021-22	School Level	Secondary School		
Current KPM Version	KPM2015	Current APASO Version	APASO-II		
Current SHS Version	SHS2015				
				Cancel	Save

- 1) Mouse over “System Tools” and then click “System Setting”.
- 2) Click “Basic Information” tab. Click “Edit”.
- 3) Enter the required information and then click “Save”.
- 4) School may choose to provide relevant contact information to the EDB. If click “Yes”, the contact information will be saved at both school and EDB server. If click “No”, the contact information will be saved at the school server only.

2.2.2 School Badge Upload

System Administrator can change the school badge at “System Setting”.

- 1) Mouse over “System Tools” and then click “System Setting”.
- 2) Click “Basic Information” tab.
- 3) Click “Upload” to upload in “School Badge Upload” section.
- 4) Select the school badge image file and click “Open”.
- 5) System Administrator may click “Reset” to set the badge to the default picture.

The screenshot shows the 'School Badge Upload' section with two buttons: 'Reset' and 'Upload'. Below the buttons is a note: 'Upload Image of 250 x 100 Pixels or 250% ratio size [JPG/JPEG/PNG File Format]'.

School Badge Upload

Reset Upload

Upload Image of 250 x 100 Pixels or 250% ratio size [JPG/JPEG/PNG File Format]

2.2.3 Advanced System Setting

The System Administrator may select the information which will be displayed in the “Online Help”.

System Setting

The screenshot shows the 'System Setting' page with three tabs: 'Basic Information', 'Advanced System Setting' (selected), and 'System Version Information'. Under 'Advanced System Setting', there is a 'Help Display Setting:' dropdown menu currently set to 'Show all Support Information'. Below this, the 'School Year Version Setting (2023-24)' section contains three rows of radio button options: 'KPM Version:' with 'KPM2022' selected; 'APASO Version:' with 'APASO-III' selected; and 'SHS Version:' with 'SHS2022' selected.

- 1) Mouse over “System Tools” and then click “System Setting”.
- 2) Click “Advanced System Setting” tab.
- 3) Select the “Help Display Setting” type.

This screenshot shows the 'System Setting' page with the 'Help Display Setting:' dropdown menu open. The menu lists five options: 'Show all Support Information', 'Show System Administrator Information only' (highlighted in blue), 'Show Teacher in charge Information only', 'Show Education Bureau Support Information only', and 'SHS2015'. The 'Advanced System Setting' tab is active. A blue 'Edit' button is visible in the bottom right corner. The screen ID 'system-setting-001' is displayed in the top right.

- 4) All users can get the related help information from the “Online Help”.

The screenshot shows the 'System Overview' dashboard. It features four colored tiles representing user counts: 'Student' (110, blue), 'Parent' (110, green), 'Teacher' (20, orange), and 'Other' (1, red). Each tile has a 'more' link. Below the tiles is a 'System Information' section showing '2022 June' and a 'Previous Month' button. On the right side, there is a vertical menu with links: 'Change Password', 'Online Help' (highlighted with a red box), 'Links', 'Self-learning Video Clips', 'Manuals And Guides', and 'Log Out'.

2.3 School Year Setting

School year setting is designed to define the current school year of the system. System Administrator should update this information at the beginning of each school year before importing student accounts and collecting information for that particular year.

- 1) Mouse over “System Tools” and click “School Year Setting”.
- 2) Select an appropriate school year as “Current School Year”.



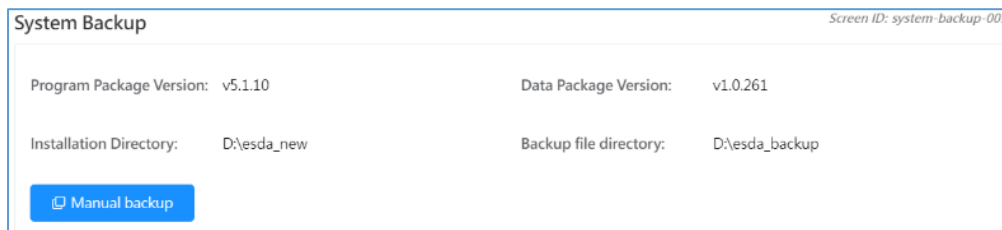
School Year Name	KPM Version	APASO Version	SHS Version	Current School Year
2021-22	KPM2015	APASO-II	SHS2015	<input checked="" type="checkbox"/>
2020-21	KPM2015	APASO-II	SHS2015	<input type="checkbox"/>
2019-20	KPM2015	APASO-II	SHS2015	<input type="checkbox"/>

Note:

User accounts are associated with the school year, change of the current school year will change the users in ESDA. Therefore, the System Administrator should make sure that all surveys have been completed and announcement has been sent to all system users before changing the current school year.

2.4 System Backup

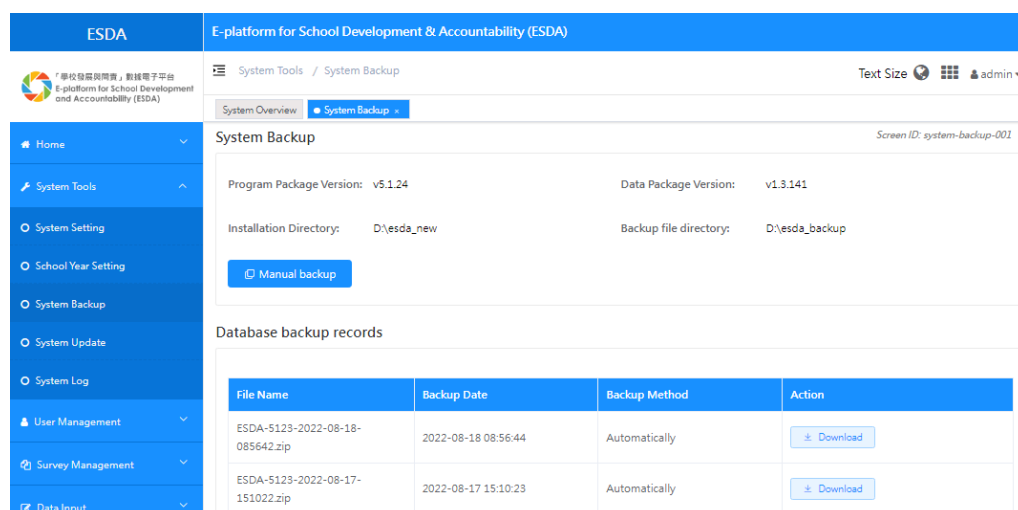
System Administrator should periodically back up the ESDA directory, e.g. “D:\esda_backup” to backup media (e.g. an external hard disk). System Administrator may check the installed directory and launch the backup procedure as follows:



Program Package Version:	v5.1.10	Data Package Version:	v1.0.261
Installation Directory:	D:\esda_new	Backup file directory:	D:\esda_backup

2.4.1 System Backup Procedures

- 1) Login ESDA with a System Administrator account.



- 2) Mouse over “System Tools”, and then click “System Backup”.
- 3) Click “Manual backup” and the system will generate a backup file with the format “xxxx.zip” to the backup file directory.

Note:

Please copy the backup file to the backup folder or a backup device.

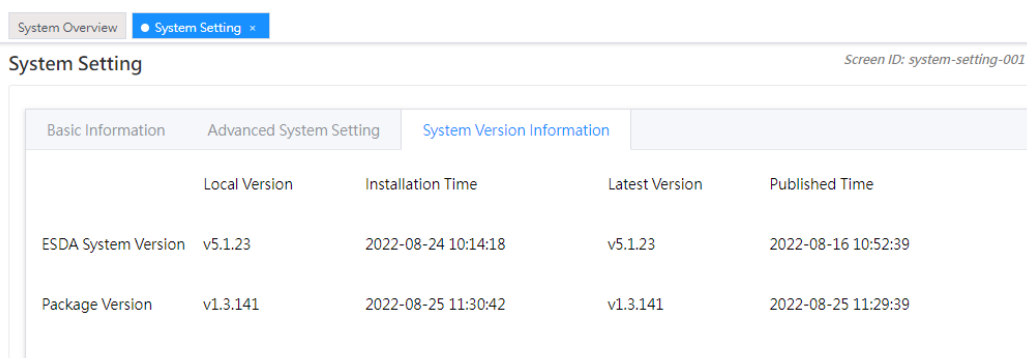
2.5 System Update

ESDA update package will be displayed on the “System Update” page. For ESDA connecting to the Internet, the system can be upgraded by using the built-in function.

2.5.1 System Version Information

System Administrator can check the system version information from "System Setting", such as the system version of the current ESDA installed and the latest ESDA version available for download.

- 1) Mouse over “System Tools” and then click “System Setting”.
- 2) Click the “System Version Information” tab.



2.5.2 System Update

The ESDA v5.0.x comes with an automatic system update routine. System Administrator may select “System Tools” > “System Update”. Components are as follows:

Item	Compinent	Details																				
1	System Update History	<p>The system update history is displayed in order of updates to facilitate the System Administrator to update the system.</p> <p>Data Package Update History</p> <table><tr><th>Package Type</th><th>Version</th><th>Update Type</th><th>Update Date</th><th>Description</th></tr><tr><td>Data Package</td><td>1.0.245</td><td>Online</td><td>2022-06-15 17:41:30</td><td></td></tr><tr><td>Data Package</td><td>1.0.244</td><td>Online</td><td>2022-06-15 17:41:24</td><td></td></tr><tr><td>- - - - -</td><td>- - - - -</td><td>- - -</td><td>- - - - - - - - - - -</td><td></td></tr></table>	Package Type	Version	Update Type	Update Date	Description	Data Package	1.0.245	Online	2022-06-15 17:41:30		Data Package	1.0.244	Online	2022-06-15 17:41:24		- - - - -	- - - - -	- - -	- - - - - - - - - - -	
Package Type	Version	Update Type	Update Date	Description																		
Data Package	1.0.245	Online	2022-06-15 17:41:30																			
Data Package	1.0.244	Online	2022-06-15 17:41:24																			
- - - - -	- - - - -	- - -	- - - - - - - - - - -																			
2	Online Update	<p>The System Administrator should complete the system update according to the "Download" and "Install" update sequences.</p> <p>Online Package List</p> <table><tr><th>Package Type</th><th>Version</th><th>Release time</th><th>Description</th><th>Action</th></tr><tr><td>Program Package</td><td>5.1.6</td><td>2022-06-12 15:33:42</td><td></td><td>± Download</td></tr><tr><td>Data Package</td><td>1.0.250</td><td>2022-06-16 12:32:09</td><td></td><td>↻ Update</td></tr></table>	Package Type	Version	Release time	Description	Action	Program Package	5.1.6	2022-06-12 15:33:42		± Download	Data Package	1.0.250	2022-06-16 12:32:09		↻ Update					
Package Type	Version	Release time	Description	Action																		
Program Package	5.1.6	2022-06-12 15:33:42		± Download																		
Data Package	1.0.250	2022-06-16 12:32:09		↻ Update																		
3	Offline Import	<p>If the system cannot get the update package file, the System Administrator can manually upload the system update package and click “Install”.</p> <div><p>Upload File Screen ID: system-update-002 ✕</p><div>📎 Choose File</div><p>🔔 Only DAT Files Can Be Uploaded</p><div>🔄 Cancel 📁 Import Data Package</div></div>																				
4	Status	<p>Successful package update will be shown in Data Package Update History.</p> <div><p>Data Package Update History</p><table><tr><th>Package Type</th><th>Version</th><th>Update Type</th><th>Update Date</th><th>Description</th></tr><tr><td>Data Package</td><td>1.0.260</td><td>Online</td><td>2022-06-24 10:37:38</td><td></td></tr><tr><td>Data Package</td><td>1.0.259</td><td>Online</td><td>2022-06-22 17:16:28</td><td></td></tr><tr><td>Data Package</td><td>1.0.258</td><td>Online</td><td>2022-06-22 17:02:15</td><td></td></tr></table></div>	Package Type	Version	Update Type	Update Date	Description	Data Package	1.0.260	Online	2022-06-24 10:37:38		Data Package	1.0.259	Online	2022-06-22 17:16:28		Data Package	1.0.258	Online	2022-06-22 17:02:15	
Package Type	Version	Update Type	Update Date	Description																		
Data Package	1.0.260	Online	2022-06-24 10:37:38																			
Data Package	1.0.259	Online	2022-06-22 17:16:28																			
Data Package	1.0.258	Online	2022-06-22 17:02:15																			

2.5.3 Auto-scan of Update Package

When the System Administrator login the system, the system will check the latest version of ESDA at the EDB server. If a new package is available for download and update, the system will automatically display the system update page with programs to be installed.

System Update

Screen ID: system-update-001

Maintenance Mode ☒

Please switch to the Maintenance Mode before updating the data package.

Tip

The current system is in its 'Maintenance Mode'.

Import Offline Data Package

[Link to download Offline Data Package](#)
The latest version includes all historical versions

Online Package List

Package Type	Version	Release time	Description	Action
Data Package	1.2.8	2022-07-05 21:40:14	1.2.8	Update

2.5.4 Update Online Package

System Administrator can install the update package:

- 1) Mouse over “System Tools” and then click “System Update”.
- 2) Switch on the “Maintenance Mode”.
- 3) Click “Update” in the Online Package List section.

Online Package List

Package Type	Version	Release time	Description	Action
Data Package	1.2.8	2022-07-05 21:40:14	1.2.8	Update

- 4) Switch off the “Maintenance Mode” after the system update is completed.

2.5.5 Offline Update Package

If system cannot download the update package from network:

- 1) Please contact the Indicators Section of EDB to obtain the related package file.
- 2) Switch on the “Maintenance Mode”.
- 3) Click “Import Offline Data Package”.

System Update

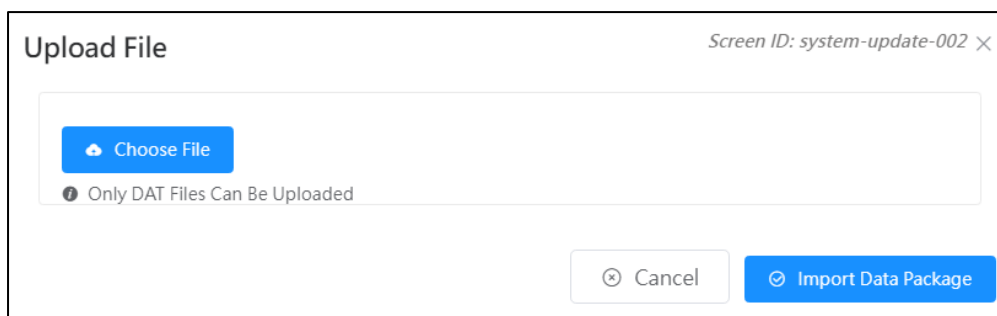
Maintenance Mode ☒

Please switch to the Maintenance Mode before updating the data package.

Import Offline Data Package

[Link to download Offline Data Package](#)
The latest version includes all historical versions

4) Browse and select the appropriate package file and click “Import Data Package”.



Upload File Screen ID: system-update-002 ✕

Only DAT Files Can Be Uploaded

5) Switch off the “Maintenance Mode” after the system update is completed.

Note:

System Administrator can import either “online” or “offline” data package.

2.6 System Log

This module allows you to view operation records of different modules. The system provides a search function on the date range, function and operation user, which helps the System Administrator review the system records.

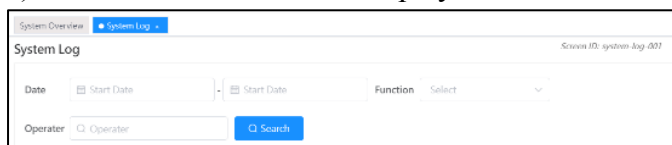
In ESDA, there are different types of system log to help System Administrator to review daily operations. They are Login, School Year Setting, System Backup, System Update, etc.

To view the log records, mouse over to “System Tools”, and then click “System Log”, select the range of “date” and “function” and then click “Search”. The system shows the related records.

1) Mouse over “System Tools” and then click “System Log”.

2) Enter the range of Date, Function or Operation User and then click “Search”.

3) The search result will be displayed.

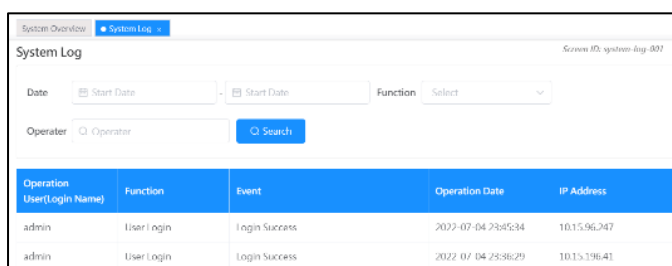


System Overview **System Log** Screen ID: system-log-001

System Log

Date: - Function:

Operator:

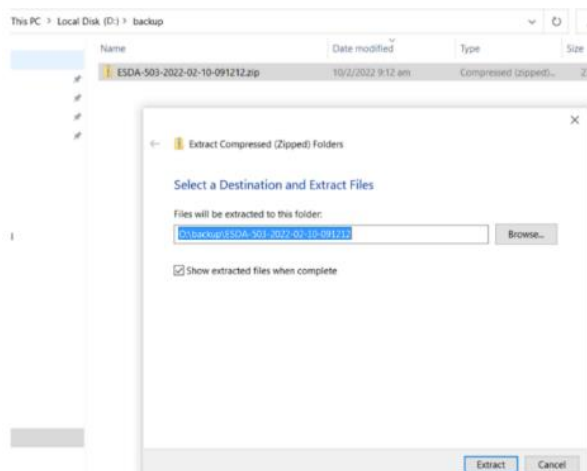


Operation User(Login Name)	Function	Event	Operation Date	IP Address
admin	User Login	Login Success	2022-07-04 23:05:34	10.15.96.247
admin	User Login	Login Success	2022-07-04 23:06:29	10.15.196.41

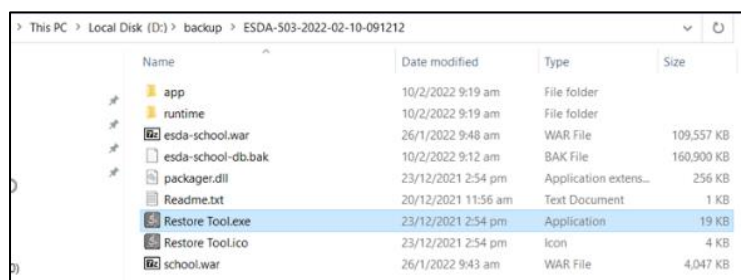
2.7 System Restore

2.7.1 System Restore Procedures

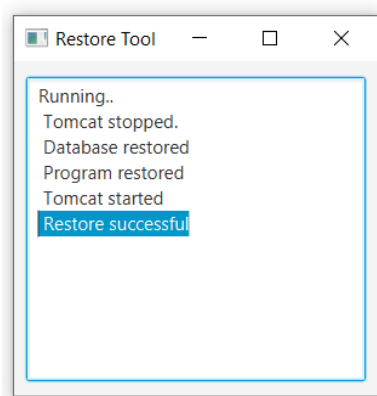
1) Unzip the backup file.



2) Run Restore Tool.exe as an Administrator.



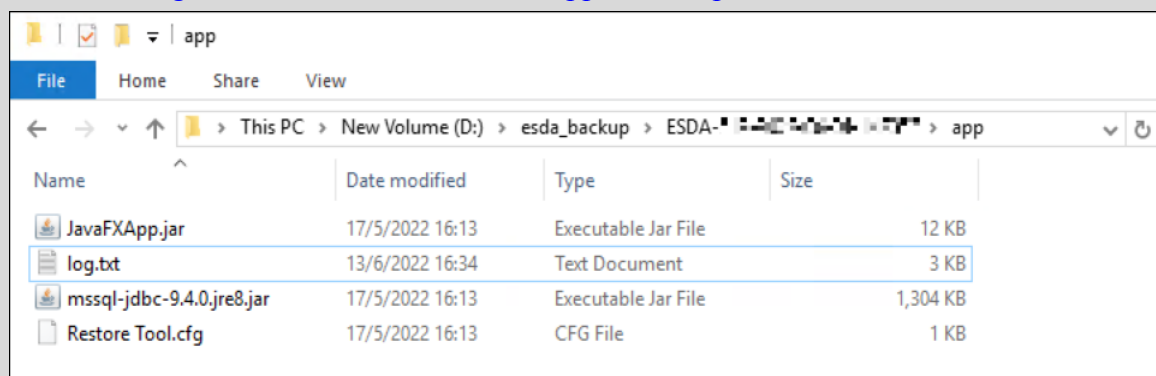
3) Data restore process will be executed automatically.



4) When completed, System Administrator can continue with the daily system management task 2.1.1. Depending on the time the data is restored, an update for the school year or system update may be required.

Note:

If the process for data restoration is not completed, please send the log file (\app\log.txt) to the EDB. The log files can be found in the unzipped backup file.

**2.7.2 Restore Procedures for a crashed system**

If ESDA crashes, System Administrator should uninstall and install ESDA again. It is suggested that System Administrator restores the latest backup data. To uninstall ESDA, please refer to the Appendix 5. To install a new ESDA, please refer to the Chapter 1.

It shall be noted that ESDA program and data must be in the same patch level before it is functioning properly. If System Administrator is planning to reinstall the system, System Administrator must apply the system to the patch level of the backup database before restoring the database. To find out the patch level, System Administrator shall refer to the system patching log as stated in Section 2.5; or from the backup filename as stated in Section 2.4.

Chapter 3 User Management

3.1 About User Management

There are seven main functions in user management: Class Level Management, Class Management, Group Management, User Management, Import User List, Export User List and Reset Passwords.

After installing ESDA, the System Administrator needs to use user management to establish user accounts, groups, and specify privileges for each group. The user account is used for login authentication and authorisation of functional modules of the system. When a user account is added to the relevant group, the user will have the specified privilege for the groups.

A search function is provided to search user, group, class level, class, gender, name and status to facilitate the management of users and groups. Except for using a function “Delete” to remove a user account permanently, the Super System Administrator can also disable individual user account when necessary (including the “Super System Administrator”) or using a function “Restore” to recover the user account. If the user account is accidentally deleted, the System Administrator can use the "Restore" function to restore the user account.

3.1.1 Before You Begin

User Management manages user accounts and sets user privileges in the system. Therefore, this functional module should only be accessed by System Administrators. To enter User Management, you must have the privilege of User Management. To reset a student's password, your account must have the “Reset User Password” privilege. In addition, all teacher accounts should have the “Reset User Password” privilege so that teachers can reset students' passwords when needed.

3.1.2 Understand School Year

The school year is an important part of ESDA. Since each class group belongs to one school year (e.g. 2021/22), the data to be displayed by the selection control of the school year is the one to which school year (e.g. student/parent accounts, survey results). To avoid the school year is selected mistakenly, this function should be performed by System Administrator. For more information on the School Year Setting, please refer to Section 2.3.

3.1.3 Groups and User Accounts

The System Administrator can create different groups (except the System Group). A valid user account should have a unique “login ID” and “User Identity”. The System Administrator can create user accounts manually or import the Excel file exported from WebSAMS. User account should be assigned

to at least one group. User of a particular group will inherit the group's privilege(s).

3.1.3.1 Introduction to Groups and User Accounts

This section illustrates details of the pre-defined groups and user accounts.

A) Groups

The two types of groups are “System Group” and “Self-defined Group”. These two groups facilitate the System Administrator to group user accounts with the same nature. Each group includes its respective Chinese and English names, as well as a list of users and the privileges they have.

ESDA v5.0.x has a default System Group, which includes six group types: Super Admin Group, Administrator Group, Student Group, Parent Group, Teacher Group and Specialist Group (for special schools). Since these are the default System Group, they cannot be added and deleted. In addition to System Group, System Administrator can also create self-defined group types.

Group Type	Group Properties	Example
System Group	<ul style="list-style-type: none">ESDA pre-defined groups cannot be added, edited or deleted.For accounts of students, parents and teachers are imported from Excel file, the system will automatically assign the user accounts to the corresponding system groups (e.g. students will be assigned to the "Student Group").	<ul style="list-style-type: none">Super Admin GroupAdmin GroupStudent GroupParent GroupTeacher Group
Self-defined Group	<ul style="list-style-type: none">Setup by System Administrator.Assign specific privileges to the specific group.	<ul style="list-style-type: none">View Report GroupSurvey Group

With “Self-Defined Group”, users with the same background can be grouped together to facilitate survey analysis for group comparison. Each group can define its own privileges and set privileges for each function.

The screenshot shows the 'New Group' interface. It includes fields for English and Chinese names, a list of privileges with checkboxes, and a user selection area. The 'Survey Management' and 'Fill in Survey' checkboxes are selected. The interface is clean with a light gray background and standard form elements.

B) User Accounts

In ESDA, there are three types of user accounts. They are students and/or parents, teachers and administrators. To create student and/or parent user accounts, System Administrator can import the student users from WebSAMS or create them in the ESDA system. To create teacher user accounts, System Administrator can import teacher user accounts from a spreadsheet or create them in ESDA. To create administrator user accounts, System Administrator can create them in ESDA.

3.1.3.2 Group Planning Strategy

The account policy determines the arrangement of the user accounts. It includes the followings:

- Password properties.
- Set the changing password authorisation to each user type.

To use an account policy to provide security for user accounts, System Administrator may consider the followings:

- Comply with the basic password regulations:
Password must contain at least 8 characters and require a mix of upper case of English Letters, lower case of English Letters, numbers, and symbols; or it must contain at least 10 characters, with a mix of upper case of English Letters, lower case of English Letters, and numbers or symbols.
- Unique password for all user accounts.

Before starting a new school year, System Administrator must update student user accounts (Please refer to section 3.2.4). System Administrator may need to update student user accounts within a school year (e.g. a student is transferred from class 1A to class 1B).

If school has set up school-based Intranet system, System Administrator can replace the “LOGINID” and “PASSWORD” columns in the Excel file with the login name and password of the school-based Intranet.

3.1.3.3 Add, Edit and Delete Groups and User Accounts

System Administrator can add, edit and delete Groups and User Accounts. For details, please refer to Section 3.5.

3.1.3.4 Import User Accounts from WebSAMS

To facilitate System Administrator to create student accounts, a set of procedures is prepared for System Administrator to extract the student accounts from WebSAMS. For details, please refer to Section 3.6.

3.1.3.5 Privilege Setting

To set privileges for groups, System Administrator can click “Edit” next to the target group, then check the privileges to be assigned to the target user group and click “Confirm”.

The screenshot shows the 'Group Management' interface. At the top, there is a search bar for 'Group Name' and buttons for 'Add' and 'Delete'. Below is a table with columns: Group Type, English Name, Chinese Name, and an 'Edit' button. The table lists four groups: Super Admin Group, Admin Group, Student Group, and Parent Group. The 'Edit' button for the 'Admin Group' is highlighted with a red box.

Below the table is the 'Edit Group' dialog. It contains fields for 'English Name' (Admin Group) and 'Chinese Name' (管理員組). Under 'Group Privilege', there are several checkboxes: Home (checked), System Tools, User Management, Survey Management, Data Input, Report Management, and Data Submission. At the bottom, there is a 'Select User' button and a 'Confirm' button.

3.1.3.6 Best Practice

To minimise tedious jobs of ESDA group(s) and user accounts creation, System Administrator is recommended to use the “Import User List” to create student accounts, parent accounts and all school-based-group(s) (e.g. class and class level groups). For details, please refer to Section 3.6.

3.2 Class Level Management

Mouse over “User Management” and then click “Class Level Management” to enter the Class Level Management Module.

The screenshot shows the 'Class Level Management' interface. At the top, there is a search bar for 'Name' and a dropdown for 'Status' (Normal). Below is a table with columns: Class Level Code, English Name, Chinese Name, Status, and an 'Edit' button. The table lists two class levels: S1 and S2, both with a status of 'Normal'. The 'Edit' button for S2 is highlighted with a blue box.

3.2.1 Create Class Level

- 1) Mouse over “User Management” and then click “Class Level Management”.
- 2) Check whether the required class level exists in the system.
- 3) Click “Add” to add a new class level.
- 4) Click “Confirm” to save the setting.

Add Class Level

Screen ID: grade-management-002

* English Name 0/50

* Chinese Name 0/50

* Class Level Code

3.3 Class Management

Mouse over “User Management” and then click “Class Management” to enter the Class Management Module.

System Overview **Class Management**

Class Management

Screen ID: class-management

Name Status

	Class Code	English Name	Chinese Name	Class Level	Status	
<input type="checkbox"/>	1A	1A	1A	S1	Normal	<input type="button" value="Edit"/>
<input type="checkbox"/>	1B	1B	1B	S1	Normal	<input type="button" value="Edit"/>

3.3.1 Create Class Groups

- 1) Mouse over “User Management” and then click “Class Management”.
- 2) Check whether the required class exists in the system.
- 3) Click “Add” to add a new class.

Add Class

Screen ID: class-management-002

* English Name 0/50

* Chinese Name 0/50

* Class Code 0/50

* Class Level

- 4) The respective Group templates will be displayed.
 - Input the group name in both “English Name” and “Chinese Name” fields.
 - In the “Class Code” field, input the unique code for this class. (Remarks: This Class Code is

to facilitate the user import by batch. It is recommended to use the same pattern as the Class Code used in WebSAMS.)

5) Click “Confirm” to save the setting.

Note:

All class groups will be automatically created when importing student accounts.

3.4 Group Management

Mouse over “User Management” and then click “Group Management” to enter the Group Management Module.

System Overview • Group Management x

Group Management Screen ID: group-management-001

Group Name

	Group Type	English Name	Chinese Name	
<input type="checkbox"/>	System Group	Super Admin Group	超級管理員組	<input type="button" value="Edit"/>
<input type="checkbox"/>	System Group	Admin Group	管理員組	<input type="button" value="Edit"/>
<input type="checkbox"/>	System Group	Student Group	學生組	<input type="button" value="Edit"/>

3.4.1 Create Self-defined Groups

- 1) Mouse over “User Management” and then click “Group Management”.
- 2) Group Management page will be displayed.
- 3) Click “Add” to add a new group.
- 4) Group template will be displayed.
 - In the group template, input the group name in both the “English Name” and “Chinese Name” fields.
 - Select group privilege.

New Group Screen ID: group-management-002

* English Name 0/100

* Chinese Name 0/100

Group Privilege

- ☐ Home
- ☐ System Tools
- ☐ User Management
- ☒ Survey Management
- ☐ Data Import
- ☐ Report Management
- ☐ Data Submission

Select User

[+ Select User](#)

[Cancel](#) [Confirm](#)

- Click “+ Select User” to select users and click “To the right >” to move users to the “Selected User”.

User List

User Type Group User Name

Status [Search](#)

<input type="checkbox"/> User List 1	<input type="checkbox"/> Selected User 0
<input type="text" value="Enter Keywords"/> <input type="checkbox"/> admin	<input type="text" value="Enter Keywords"/> No data

[< To the left](#) [To the right >](#)

5) Click “Confirm” to save the setting.

3.4.2 Modify Groups

- 1) Mouse over “User Management” and then click “Group Management”.
- 2) Click “Edit” of the group to be modified.
- 3) Click “Save” to save the modification.

System Overview
Group Management

Screen ID: group-management-001

Group Name

	Group Type	English Name	Chinese Name	
<input type="checkbox"/>	System Group	Super Admin Group	超級管理員組	<input type="button" value="Edit"/>
<input type="checkbox"/>	System Group	Admin Group	管理員組	<input type="button" value="Edit"/>
<input type="checkbox"/>	System Group	Student Group	學生組	<input type="button" value="Edit"/>

3.4.3 Delete Groups

- 1) Mouse over “User Management” and then click “Group Management”.
- 2) Select the group type from the group list and then click “Delete”.

System Overview
Group Management

Screen ID: group-management-001

Group Name

	Group Type	English Name	Chinese Name	
<input checked="" type="checkbox"/>	Self-defined Group	Survey Group	調查組	<input type="button" value="Edit"/>

- 3) Click “Confirm” to confirm the deletion.

Notify

3.4.4 Set Privilege(s) for Group(s)

- 1) Mouse over “User Management” and then click “Group Management”.
- 2) Select “Group Type” and click “Edit”.
- 3) Click “Group Privilege” of the group type.
- 4) Check the group privilege.

5) Click “Confirm” to save the privilege setting.

Screen ID: group-management-003

* English Name: Survey Group 12/100

* Chinese Name: 調查組 3/100

Group Privilege:

- ☐ Home
- ☐ System Tools
- ☐ User Management
- ☒ Survey Management
- ☐ Data Import
- ☐ Report Management
- ☐ Data Submission

Select User: [dropdown]

Buttons: Cancel, Confirm

3.5 User Management

Mouse over “User Management” and then click “User Management” to enter the User Management.

Screen ID: user-management-001

User Management

Search: User Type [Select] Group [Select] User Name [User Name] Status [Normal] Search

Buttons: Add, Disable, Delete

User Type	Login Name	Name (English)	Name (Chinese)	Group	Status
Administrator	admin	admin	系統管理員	Super Admin Group	Normal

Edit button

3.5.1 Create an Individual Student Accounts

- 1) Mouse over “User Management” and then click “User Management”.
- 2) Click “Add” to create a student account.
- 3) Select “Student” from the “User Type”.

Screen ID: user-management-002

* User Type: Select

Dropdown options: Student, Parent

Buttons: Cancel, Confirm

4) In “Add User” page:

- Input all the fields of student information.
- In the “Group”, select the group that the student belongs to, i.e. “Student Group”.
- Click “Confirm” to save the student account.

The screenshot shows the 'Add User' form with the following fields and values:

- User Type:** Student (dropdown menu)
- Login Name:** Login Name (text input, 0/50)
- Name (English):** Name (English) (text input, 0/100)
- Name (Chinese):** Name (Chinese) (text input, 0/100)
- Login Password:** Login Password (password input, 0/100)
- Birthday:** yyyy-mm-dd (date input)
- Height/cm:** Height/cm (text input)
- Weight/kg:** Weight/kg (text input)

Buttons: Cancel, Confirm

3.5.2 Create an Individual Parent Accounts

- 1) Mouse over “User Management” and then click “User Management”.
- 2) Click “Add” to create a parent account.
- 3) Select “Parent” from the “User Type”.

The screenshot shows the 'Add User' form with the 'User Type' dropdown menu open. The 'Parent' option is highlighted with a red box. The other fields are empty.

Buttons: Cancel, Confirm

- 4) In “Add User” page:

- Input all the fields of parent information.
- Input “Student Name (Parent)” in “Name (English)” and “Name (Chinese)” (e.g. Chan Tai Man (Parent)).
- Click “Confirm” to save the parent account setting.

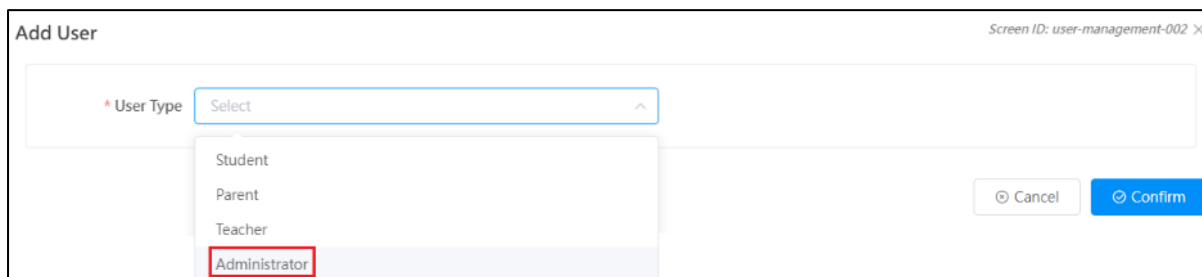
The screenshot shows the 'Add User' form with the following fields and values:

- User Type:** Parent (dropdown menu)
- Login Name:** Login Name (text input, 0/50)
- Name (English):** Name (English) (text input, 0/100)
- Name (Chinese):** Name (Chinese) (text input, 0/100)
- Login Password:** Login Password (password input, 0/100)
- Children Gender:** Select (dropdown menu)
- Registration No.:** Registration No. (text input)
- Children Class:** Select (dropdown menu)

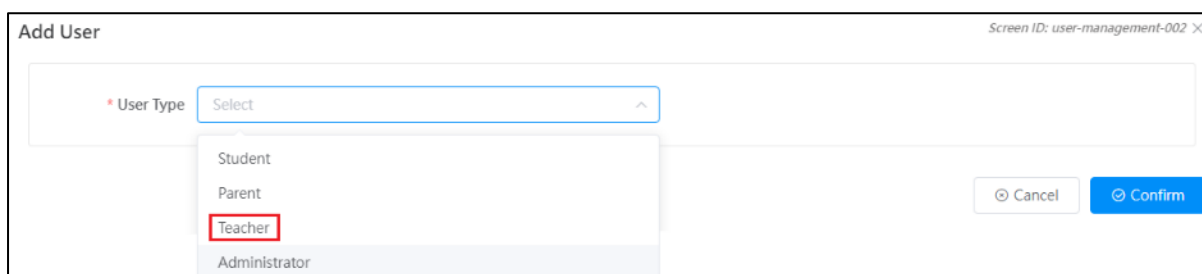
Buttons: Cancel, Confirm

3.5.3 Create an Administrator / Teacher Account

- 1) Mouse over “User Management” and then click “User Management”.
- 2) Click “Add”.
- 3) Select “Administrator” or “Teacher” from the “User Type”.



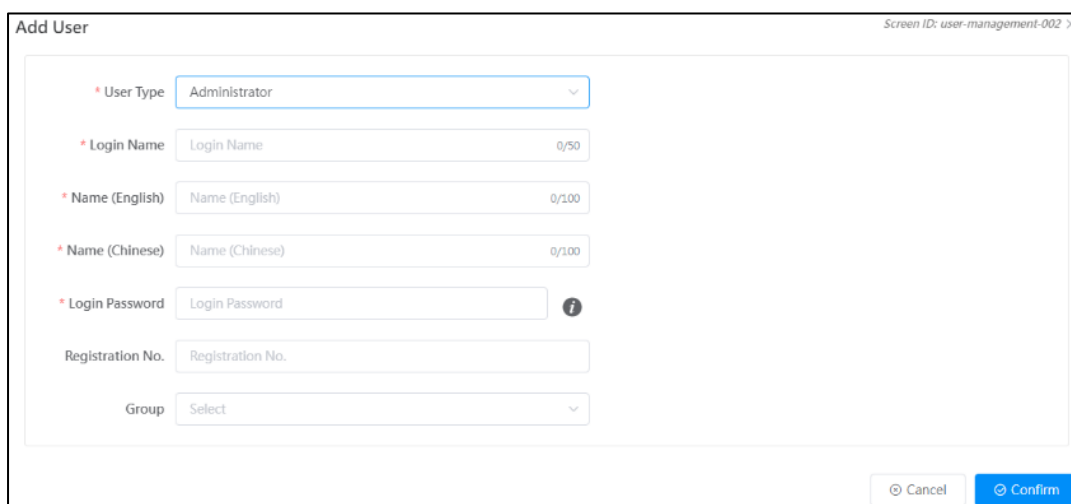
The screenshot shows the 'Add User' form with the 'User Type' dropdown menu open. The options are Student, Parent, Teacher, and Administrator. The 'Administrator' option is highlighted with a red box. The form also includes 'Cancel' and 'Confirm' buttons.



The screenshot shows the 'Add User' form with the 'User Type' dropdown menu open. The options are Student, Parent, Teacher, and Administrator. The 'Teacher' option is highlighted with a red box. The form also includes 'Cancel' and 'Confirm' buttons.

- 4) In “Add User” page:

- Input all the fields of user information.
- In the “Group”, select the group that the user belongs to and click “Confirm”. To assign special privilege to a group of users, you should create a self-defined group (example: View Reports).



The screenshot shows the 'Add User' form with all fields filled out. The 'User Type' is set to 'Administrator'. The fields include: Login Name (0/50), Name (English) (0/100), Name (Chinese) (0/100), Login Password (with a password strength indicator), Registration No., and Group (Select). The form also includes 'Cancel' and 'Confirm' buttons.

Screen ID: user-management-002

* User Type: Teacher

* Login Name: Login Name (0/50)

* Name (English): Name (English) (0/100)

* Name (Chinese): Name (Chinese) (0/100)

* Login Password: Login Password ⓘ

Registration No.: Registration No.

Group: Select

Cancel Confirm

3.5.4 Modify User Accounts

- 1) Mouse over “User Management” and then click “User Management”.
- 2) Enter selection criteria, such as “User Type”, “Group” or “Status” and click “Search”.
- 3) Click “Edit” to edit an individual user record.

Screen ID: user-management-003

* User Type: Teacher

* Login Name: chanfk

* Name (English): CHAN Fan Kel Franky (19/100)

* Name (Chinese): 陳分其 (3/100)

Registration No.: R_chanfk

Group: Teacher Group

Cancel Confirm

- 4) In “Edit User” page:
 - Input all the fields of student information.
 - Click “Confirm” to save the settings.

Note:

All modifications will instantly be reflected in the system after you have saved the user record.

3.5.5 Delete User Accounts

- 1) Mouse over “User Management” and then click “User Management”.
- 2) Enter selection criteria, such as “User Type”, “Group”, “User Name”, or “Status” and click “Search”.
- 3) Check the checkbox of respective user records, and then click “Delete”.

4) All deleted users will be moved to the list of deleted users.

User Management Screen ID: user-management-001

User Type: Group: User Name: Status:

	User Type	Login Name	Name (English)	Name (Chinese)	Group	Status	
<input checked="" type="checkbox"/>	Teacher	Teacher1	Teacher1	Teacher1	Teacher Group	Normal	<input type="button" value="Edit"/>

3.5.6 Restore Deleted User Accounts

- 1) Mouse over “User Management” and then click “User Management”.
- 2) Select “Delete” in “Status” and click “Search”.
- 3) Check the checkbox of respective user records, and then click “Active” and “Confirm” to restore the user accounts.

User Management Screen ID: user-management-002

User Type: Group: User Name: Status:

	User Type	Login Name	Name (English)	Name (Chinese)	Group	Status	
<input checked="" type="checkbox"/>	Teacher	Teacher1	Teacher1	Teacher1	Teacher Group	Deleted	<input type="button" value="Edit"/>

Warning

Confirmation?

Note:

The users’ personal information, i.e. password and group(s), will be restored to the original values before deletion.

3.5.7 Disable User Account

- 1) Mouse over “User Management” and then click “User Management”.
- 2) Enter selection criteria, such as “User Type”, “Group”, “User Name”, or “Status” and click “Search”.
- 3) Check the checkbox of respective user records, and then click “Disable”.
- 4) All deleted users will be moved to the list of disabled users.

User Management Screen ID: user-management-002

User Type: Group: User Name: Status:

	User Type	Login Name	Name (English)	Name (Chinese)	Group	Status	
<input checked="" type="checkbox"/>	Teacher	Teacher1	Teacher1	Teacher1	Teacher Group	Normal	<input type="button" value="Edit"/>

3.5.8 Restore Disabled User Account

- 1) Mouse over “User Management” and then click “User Management”.
- 2) Select “Disable” in “Status” and click “Search”.
- 3) Check the checkbox of respective user records, and then click “Restore” and “Confirm” to restore the user accounts.

User Management Screen ID: user-management-002

User type: Group: User Name: Status:

<input type="checkbox"/>	User Type	Login Name	Name (English)	Name (Chinese)	Group	Status	
<input checked="" type="checkbox"/>	Teacher	teacher1	teacher1	teacher1	teacher Group	Disabled	<input type="button" value="Edit"/>

Warning

Confirmation?

Note:

The users' personal information, i.e. password and group(s), will be restored to the original values before deletion.

3.5.9 Restore Locked Accounts

If a user fails to login five times or more, the user account will be locked by the system and the user cannot login to the system again. The System Administrator needs to restore the user account before the accounts can be reused.

- 1) Mouse over “User Management” and then click “User Management”.
- 2) Select “Lock” in “Status” and click “Search”.
- 3) Check the checkbox of respective user records, and then click “Active” and “Confirm” to restore the user accounts.

User Management Screen ID: user-management-003

User type: Group: User Name: Status:

<input type="checkbox"/>	User Type	Login Name	Name (English)	Name (Chinese)	Group	Status	
<input checked="" type="checkbox"/>	Teacher	teacher1	teacher1	teacher1	Teacher Group	Locked	<input type="button" value="Edit"/>

Warning

Confirmation?

Note:

The users' personal information, i.e. password and group(s), will be restored to the original values before locking.

3.6 Import User List

To generate user accounts quickly, the “Import User List” function provides the necessary functionality for quick account generation. Schools may download the Excel templates for the interface of different types of users and upload the file to the system to create user accounts.

- 1) Mouse over “User Management” and then click “Import User List”.
- 2) “Import User List” page will be shown.

System Overview **Import User List** x

Import User List Screen ID: import-user-list-001

User Type ☐ Teacher ☐ Student and Parent ☐ Others

Excel Document [Select The File](#) [Import](#)

Excel contains a maximum of 2000 users.

Templates and SQL Statement for Download

Teacher	File Template	Template documentation
Student and Parent	File Template	Template documentation
Others	File Template	Template documentation

3.6.1 Download Excel Template

- 1) Mouse over “User Management” and then click “Import User List”.
- 2) The interface of “Import User List” will be displayed.
- 3) To download an Excel file template for importing teacher accounts, click “File Template” for “Teacher” in “Templates and SQL Statement for Download”.
- 4) To download an Excel file template for importing student and parent accounts, click “File Template” for “Student and Parent” in “Templates and SQL Statement for Download”.
- 5) To download an Excel file template for importing other accounts, click “File Template” for “Others” in “Templates and SQL Statement for Download”.
- 6) Click “Save” to save the file on your computer.

Templates and SQL Statement for Download

Teacher	File Template	Template documentation
Student and Parent	File Template	Template documentation
Others	File Template	Template documentation

Note:

If you want to refer to the help file for the Excel template, you can click “Template documentation”.

3.6.2 Create Student Accounts from WebSAMS

1) Login to WebSAMS, select “Data Management” > “Query Maintenance”.

2) Click “Add Advance”.

3) In the interface of “Add Advance Query”,

- Input the “Query Name” and “Query Description”.
- In the “SQL Statement” field, input the script as below. (Remarks: Please change the school year 20xx to current school year, e.g. if current school year is 2023/24, please change to 2023).

```
SELECT CAST(a.SCHYEAR as varchar) + '-' + SUBSTRING(CAST(a.SCHYEAR+1 as varchar),3,2) AS 'School Year',
'#'|| a.REGNO AS 'Registration No.', a.CLASSLVL AS 'Class Level Code', a.CLASSCODE AS 'Class Code' ,
a.CLASSNO AS 'Class No.', a.ENNAME AS 'Name (English)', a.CHNAME AS 'Name (Chinese)', a.SEX AS 'Sex', 's'||
a.REGNO AS 'Login Name', 's'|| 'Pas@' + a.REGNO AS 'Password', DATEFORMAT(a.DOB, 'YYYY/MM/DD') AS
'DOB' , a.HEIGHT AS 'Height/cm' , a.WEIGHT AS 'Weight/kg' , 'A' AS 'User Type' FROM
VW_STU_LATESTSTUDENT a WHERE a.schyear =20xx ORDER BY a.classlvl , a.classcode, a.classno
```

- Click “Save”.

Note:

You may copy this script from the “Documentation” of the “Import User List”. Make sure you change the last parameter, “a.schyear” accordingly.

- 4) Click “Go To Execute” to execute the data selection.

[S-DAT03-03] Data Management > Query Maintenance

Modify Advance Query

Query Name ESDA Student Data

Query Description Extract Student Data for ESDA Platform

SQL Statement

```
SELECT CAST(a.SCHYEAR as varchar) + '-' +
SUBSTRING(CAST(a.SCHYEAR+1 as varchar),3,2) AS 'School Year',
'#'|| a.REGNO AS 'Registration No.', a.CLASSLVL AS 'Class
Level Code', a.CLASSCODE AS 'Class Code', a.CLASSNO AS 'Class
No.', a.ENNAME AS 'Name (English)', a.CHNAME AS 'Name
(Chinese)', a.SEX AS 'Sex', 's'|| a.REGNO AS 'Login Name',
's'|| 'Pas@' + a.REGNO AS 'Password', DATEFORMAT(a.DOB,
'YYYY/MM/DD') AS 'DOB', a.HEIGHT AS 'Height/cm', a.WEIGHT AS
'Weight/kg', 'A' AS 'User Type' FROM VW_STU_LATESTSTUDENT a
WHERE a.schyear = 2022 ORDER BY a.classlvl, a.classcode,
a.classno
```

Go To Execute Save Back

- 5) At the “Output Format”, select “Excel” and then click “Export Result”.

[S-DAT04-03] Data Management > Execution

Query Name ESDA Student Data

Query Description Extract Student Data for ESDA Platform

SQL Statement

```
SELECT CAST(a.SCHYEAR as varchar) + '-' + SUBSTRING(CAST(a.SCHYEAR+1 as
varchar),3,2) AS 'School Year', '#'|| a.REGNO AS 'Registration No.',
a.CLASSLVL AS 'Class Level Code', a.CLASSCODE AS 'Class Code', a.CLASSNO
AS 'Class No.', a.ENNAME AS 'Name (English)', a.CHNAME AS 'Name
(Chinese)', a.SEX AS 'Sex', 's'|| a.REGNO AS 'Login Name', 's'|| 'Pas@'
+ a.REGNO AS 'Password', DATEFORMAT(a.DOB, 'YYYY/MM/DD') AS 'DOB',
a.HEIGHT AS 'Height/cm', a.WEIGHT AS 'Weight/kg', 'A' AS 'User Type'
FROM VW_STU_LATESTSTUDENT a WHERE a.schyear = [REDACTED] ORDER BY a.classlvl ,
a.classcode, a.classno
```

Output Format

☐ HTML

☐ Text File

☒ Excel

☐ Word

☐ CSV Delimiter [v]

View Result **Export Result** Execute and Save Next Close

- 6) Input password and “OK” to save the output file.

Encrypt Document

Encrypt the contents of this file

Password [REDACTED] ✓

Confirm Password [REDACTED] ✓

OK Cancel 英

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 criteria above.

Length of password: 8-40 characters

3.6.3 Batch Student and Parent Account Creation from WebSAMS

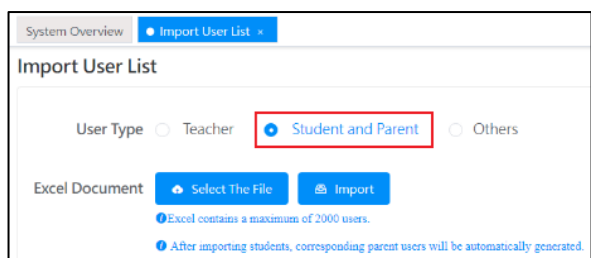
Prerequisite:

- You should have the Excel file either exported from WebSAMS or generated from a spreadsheet.
- The imported file should include ALL student accounts (e.g. both NEW and EXISTING students). Any missing account in the imported Excel user file will be automatically moved to the list of deleted users in ESDA.

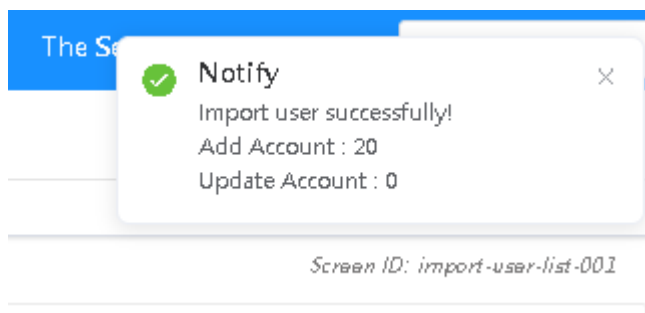
1) Mouse over “User Management” and then click “Import User List”.

2) The interface of “Import User List” will be displayed.

- Check whether the displayed “Current School Year” matches with the student data you will import. (Note: If the current school year does not match with the data, please adjust the current school year in “System Tools” > “School Year Setting”.)
- To import student and parent accounts together, select “Student and Parent” and then click “Select the File” to select the file.
- Click “Import” to create / update / delete user accounts.



3) The number of student and parent accounts that have been created/updated will be displayed in the following import summary.



3.6.4 Batch Teacher Account Creation from Excel file

Prerequisite:

Prepare an Excel file for importing teacher accounts according to the sample below. The file shall contain only those changed records. System Administrator is suggested to delete those retired accounts in “User Management”.

Registration No.	Name (English)	Name (Chinese)	Login Name	Password	User Type
t123	Teacher 1	教師 一	t123	P@ssw0rd	C
t124	Teacher 2	教師 二	t124	P@ssw0rd	C
t125	Teacher 3	教師 三	t125	P@ssw0rd	C
t126	Teacher 4	教師 四	t126	P@ssw0rd	C
t127	Teacher 5	教師 五	t123	P@ssw0rd	C

- 1) Mouse over “User Management” and then click “Import User List”.
- 2) To import teacher accounts in batch, select “Teacher” in the “User Type” and then click “Select The File”.
- 3) Click “Import” to create or update teacher accounts.

System Overview Import User List x

Import User List

User Type ☒ Teacher ☐ Student and Parent ☐ Others

Excel Document

Excel contains a maximum of 2000 users.

3.6.5 Create Random Accounts

- 1) Mouse over “User Management” and then click “Import User List”.
- 2) Input all information including “User Type”, “Prefix”, “Class”, “Gender” and “Number of Accounts” and click “Create”.

Generate Accounts Randomly

User Type ☒ Student and Parent ☐ Teacher

* Prefix i

* Class v

* Gender ☐ Male ☐ Female i

* Number of

Accounts

[Create](#)

3) The system will randomly generate user accounts to a spreadsheet file. Review the file and import the users in the spreadsheet file to the system.

System Overview **Import User List**

Import User List

User Type ☐ Teacher ☒ Student and Parent ☐ Others

Excel Document [Select The File](#) [Import](#)

i Excel contains a maximum of 2000 users.

i After importing students, corresponding parent users will be automatically generated.

[esda_user_student_import_list.xls](#)

3.7 Export User List

This module is designed to export an Excel file of teachers, students and parents accounts in the current school year.

- 1) Mouse over “User Management” and then click “Export User List”.
- 2) Teacher, Student, and Parent user lists will be displayed.
- 3) Click “Export User List in Current Year” to download the corresponding user list.

User Management / Export User List

Text Size admin

System Overview **Export User List**

Screen ID: export-user-list-001

Teacher	Export User List in Current Year
Student	Export User List in Current Year
Parent	Export User List in Current Year

3.8 Reset User Password

All the user passwords used in ESDA v4.6.0 or before are not applicable for ESDA v5.0.x system. The System Administrator has to assist all users in setting the passwords applicable for ESDA v5.0.x system.

If students or parents lose their passwords, System Administrator can reset their passwords with the “Reset Passwords” function.

System Overview | **Reset Passwords** | Screen ID: reset-passwords-001

Reset Passwords

User Type: Student | Group: Select | Class Level: Select | Class: Select | Gender: Select | User Name: User Name | Status: Normal | **Search**

Password Reset Mode: Random

Select users

☐ User List 662

☐ Selected User 0

☒ [1A01] CHAN TSZ
☐ [1A02] CHAN YAN
☐ [1A03] CHAN YING
☐ [1A04] CHENG SIU

< To the left | To the right >

- 1) Mouse over “User Management” and then click “Reset Passwords”.
- 2) Input searching criteria such as “User Type”, “Group”, “Class Level”, “Class”, “Gender”, “User Name” or “Status” and then click “Search”.
- 3) Select the student(s) whose password(s) need to be changed and click “To the right >”. ⇒ **Tips**

Select users

☒ User List 1/662

☐ Selected User 0

☒ [1A01] CHAN TSZ
☐ [1A02] CHAN YAN
☐ [1A03] CHAN YING
☐ [1A04] CHENG SIU

< To the left | **To the right >**

Tips:

To select all student/parent accounts within the user list, please click the “Select All” button in the first row of “User List” and then click “To the right >”.

- 4) Select “Random” or “User defined” in “Password Reset Mode”.

The screenshot shows the 'Password Reset Mode' dropdown menu. The 'User defined' option is selected and highlighted in blue. Below it, the 'Random' option is visible. To the right of the dropdown is an information icon (i).

- 5) If “User defined” mode is selected, please input the new password of student/parent to “Login Password”. Password must contain at least 8 characters and require a mix of upper case of English Letters, lower case of English Letters, numbers, and symbols; or it must contain at least 10 characters, with a mix of upper case of English Letters, lower case of English Letters, and numbers or symbols.

The screenshot shows the 'Login Password' input field, which is highlighted with a red rectangle. The field contains the text 'Login Password'. To the right of the field is an information icon (i).

- 6) Click “Password Reset”. The password(s) of the selected student(s) or parent(s) will be changed instantly.

The screenshot shows the 'Password Reset' interface. It features a 'Select users' section with a 'User List' containing 661 users and a 'Selected User' section with 1 user. The 'User List' includes a search bar and a list of users with checkboxes. The 'Selected User' section also has a search bar and a list of users with checkboxes. A 'Password Reset' button is highlighted with a red rectangle at the bottom right.

Chapter 4 Survey Management

4.1 About Survey Management

This module is used to administer pre-defined surveys for various respondents. There are two types of surveys. The differences are shown in the table below. After entering the Manage Survey module, a summary table shows a list of surveys with “Start / End Date”, “Target Users”, “Mode” and “Response Rate”. To administer a survey, the Administrator selects a survey from the survey list and defines its properties of the survey. The Administrator can specify the start/end date of conducting the survey, choose the survey mode (online, offline, or online and offline), and select target users. To facilitate random target user selection, the system provides a function to draw users randomly with a defined percentage of users.

Online mode means target users fill in questionnaires through the web interface in ESDA. In contrast, offline mode means target users fill in the questionnaires with other methods, such as paper and pen format. Details about publishing online and offline surveys can be found in Sections 4.2 and 4.3.

Before You Begin

The Survey Management module is solely for administering surveys and defining the target respondents of each survey. It supports both online and offline modes to cater for different situations. You should possess the “Survey Management” privilege to access the module.

Best Practices

For Type I Survey, you can administer them once per school year. You should carefully select the survey mode, target respondents and start/end date. Although Type II Surveys can be administered many times per school year, you should not administer these surveys too frequently for the same group of target respondents.

4.1.1 Understanding Survey Types and Modes

There are three types of survey in the system, namely, 1. Stakeholder Survey (SHS), 2. Assessment Program for Affective and Social Outcomes (APASO), and 3. Inspection Related Surveys, namely, External School Review (ESR) Questionnaire, Focus Inspection (FI) Questionnaire, Comprehensive Review (CR) Questionnaire and School Development and Accountability Framework (SDA) Questionnaire. The following is the description of these surveys.

1. Stakeholder Survey (SHS) – It is a measure to help schools collect views from teachers, specialists,

students and parents (random sampling of students and parents across different class levels) on the school work to facilitate school self-evaluation. The survey results form part of the Key Performance Measures (KPM) data.

2. APASO – It allows schools to assess students' performance and development in the affective and social domains. This tool is applicable to Hong Kong primary (P3 – P6) and secondary (S1 – S6) school students. Results from one of the pre-defined survey will form one of the Key Performance Measures item. Please refer to the KPM website (<http://kpm.edb.gov.hk>) & APASO website (<http://apaso.edb.gov.hk>) for details.

3. Inspection Related Surveys – This survey is designed to collect views from schools after the completion of related school inspections, including ESR, FI, CR and SDA Questionnaire.

According to the properties of the surveys, the surveys can be classified into two types.

Type I Survey (e.g. SHS)	Type II Survey (e.g. APASO)
<ol style="list-style-type: none">1. The surveys can only be administered once per year.2. The collected responses can be submitted to the EDB through ESDA.3. All surveys must be assigned to a system group (Teacher, Student, Parent, etc.).	<ol style="list-style-type: none">1. The surveys can be administered more than once per year.2. The collected responses can be submitted to the EDB on an optional basis, except for the KPM.3. Surveys can be assigned to classes or forms.4. Surveys can be assigned to specific groups or users.
<i>The duration between administrations of APASO-II Surveys should be at least half a year within the same school year.</i>	

Note:

You should export the responses of the surveys to KPM items. For details, please refer to Section 4.4.

4.1.2 Preparing Survey for a New School Year

To prepare for administering surveys for a new school year, schools are required to complete the following steps:

- Change School Year Setting, please refer to Section 2.3
- Import User List, please refer to Section 3.6
- Import Update Packages, please refer to Section 2.5

4.1.3 Survey Administrator Tasks

4.1.3.1 Contact System Administrator to ensure that the following items are ready

- 1) The latest version of Programme Package and Data Package have been imported into ESDA.
- 2) User accounts which include teacher, student, parent, and specialist (for special schools only), have been created and assigned to appropriate system groups.
- 3) “Fill In Survey” group permission should be assigned to user groups which will fill in questionnaires online.

4.1.3.2 Administering Stakeholder Survey for Teachers

- 1) The teacher group is assigned to the target users by default. Please ensure that all teachers, including the principal, are selected in the target user list.
- 2) Select “online” mode if teachers will fill in the questionnaire through the web interface. Otherwise, select “offline” mode and distribute a copy of the questionnaire and answer sheet to the target respondents. In the Manage Survey module, the response mode can be switched to “online”, “offline”, or mixed “online and offline”.
- 3) Specify the start and end dates for filling in the questionnaire.

4.1.3.3 Administering Stakeholder Survey for Students

- 1) Ensure that all student accounts have been created and assigned to the appropriate class level group and class group.
- 2) All class level groups should be mapped with standard class level codes.
- 3) To publish Stakeholder Survey for students, Survey Administrator cannot select respondents. Student respondents must be drawn randomly by the system or according to odd or even class numbers of the students.
- 4) Select “online” mode if students will fill in the questionnaire through the web interface. Otherwise, select “offline” mode and distribute a copy of the questionnaire and answer sheet to the target respondents. In the Manage Survey module, the response mode can be switched to “online”, “offline”, or mixed “online and offline”.
- 5) Specify the start and end dates for filling in the questionnaire.

4.1.3.4 Administering Stakeholder Survey for Parents

- 1) Ensure that all parent accounts have been created and assigned to the appropriate class level group and class group.
- 2) All class level groups should be mapped with standard class level codes.
- 3) To publish the Stakeholder Survey for parents, Survey Administrator cannot select respondents. Parent respondents must be drawn randomly by the system or according to odd or even class

numbers of the students.

- 4) Select “online” mode if parents will fill in the questionnaire through the web interface. Otherwise, select “offline” mode and distribute a copy of the questionnaire and answer sheet to target respondents. In the Manage Survey module, the response mode can be switched to “online”, “offline”, or mixed “online and offline”.
- 5) Specify the start and end dates for filling in the questionnaire.

4.1.3.5 Administering Stakeholder Survey for Specialists

- 1) By default, the specialist group is assigned to the target users. Please ensure that all specialists are selected in the target user list.
- 2) Select “online” mode if specialists will fill in the questionnaire through the web interface. Otherwise, select “offline” mode and distribute a copy of the questionnaire and answer sheet to the target respondents. In the Manage Survey module, the response mode can be switched to “online”, “offline”, or mixed “online and offline”.
- 3) Specify the start and end dates for filling in the questionnaire.

4.1.3.6 Administering APASO Questionnaire

- 1) Ensure that all student accounts have been created and assigned to the appropriate class level group and class group.
- 2) All class level groups should be mapped with standard class level codes.
- 3) To publish APASO questionnaire, Survey Administrator cannot select respondents. Student respondents must be drawn randomly by the system or according to odd or even class numbers of the students.
- 4) Select “online” mode if students will fill in the questionnaire through the web interface. Otherwise, select “offline” mode and distribute a copy of the questionnaire to the target respondents. In the Manage Survey module, the response mode can be switched to “online”, “offline”, or mixed “online and offline”.
- 5) Specify the start and end dates for filling in the questionnaire.

4.1.3.7 Administering External School Review (ESR) Questionnaire

- 1) Receive a password from the EDB.
- 2) Ensure that the system clock of the server is set up properly.
- 3) Ensure that the ESDA server is connected to the Internet, which is necessary for publishing an ESR questionnaire.
- 4) Select the principal, teachers and specialists (for special schools) in the target user list.
- 5) Only “Online” mode is provided for this questionnaire. Once the questionnaire is activated, the duration for completion is 4 weeks. Please inform the target respondents of the start and end dates.

4.1.3.8 Administering Focus Inspection (FI) Questionnaire

- 1) Receive a password from the EDB.
- 2) Ensure that the system clock of the server is set up properly.
- 3) Ensure that the ESDA server is connected to the Internet, which is necessary for publishing a FI questionnaire.
- 4) Select the principal, teachers and specialists (for special schools) in the target user list.
- 5) Only “Online” mode is provided for this questionnaire. Once the questionnaire is activated, the duration for completion is 4 weeks. Please inform the target respondents of the start and end dates.

4.1.3.9 Administering Comprehensive Review (CR) Questionnaire

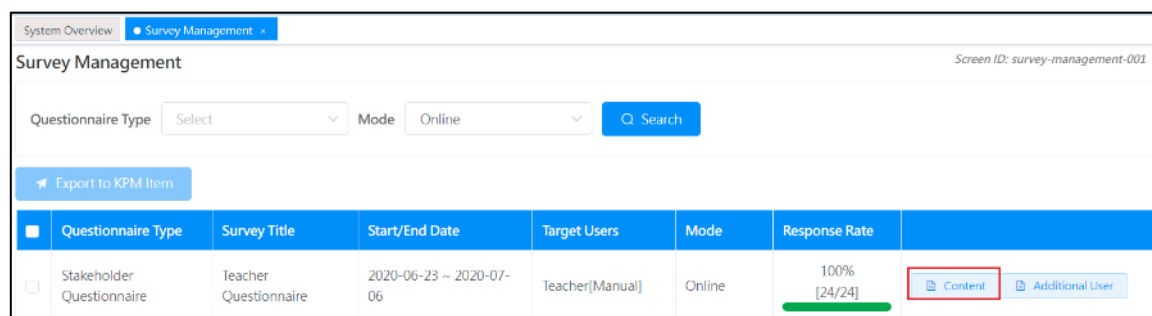
- 1) Receive a password from the EDB.
- 2) Ensure that the system clock of the server is set up properly.
- 3) Ensure that the ESDA server is connected to the Internet, which is necessary for publishing a CR questionnaire.
- 4) Select the principal, teachers and specialists (for special schools) in the target user list.
- 5) Only “Online” mode is provided for this questionnaire. The duration for completion is specified in the notification letter. Please inform the target respondents of the start and end dates.

4.1.3.10 Administering School Development and Accountability Framework (SDA) Questionnaire

- 1) Receive a password from the EDB.
- 2) Ensure that the system clock of the server is set up properly.
- 3) Ensure that the ESDA server is connected to the Internet, which is necessary for publishing a SDA questionnaire.
- 4) Select the principal, teachers and specialists (for special schools) in the target user list.
- 5) Only “Online” mode is provided for this questionnaire. The duration for completion is specified in the notification letter. Please inform the target respondents of the start and end dates.

4.1.3.11 Other Tasks

- 1) You may download the user list that has not completed the online questionnaires and inform those users to complete the questionnaire.



The screenshot displays the 'Survey Management' interface. At the top, there are tabs for 'System Overview' and 'Survey Management'. Below the tabs, there are filters for 'Questionnaire Type' (Set to 'Select') and 'Mode' (Set to 'Online'), along with a 'Search' button. A table lists the survey data. The first row shows a 'Stakeholder Questionnaire' titled 'Teacher Questionnaire' with a start/end date of '2020-06-23 ~ 2020-07-06', target users 'Teacher[Manual]', and a response rate of '100% [24/24]'. A green progress bar is shown below the response rate. To the right of the table, there are buttons for 'Content' and 'Additional User'.

	Questionnaire Type	Survey Title	Start/End Date	Target Users	Mode	Response Rate	
<input type="checkbox"/>	Stakeholder Questionnaire	Teacher Questionnaire	2020-06-23 ~ 2020-07-06	Teacher[Manual]	Online	100% [24/24]	Content Additional User

Questionnaire Details Published Screen ID: survey-management-002

Survey Title (English) Teacher Questionnaire

Survey Title (Chinese) 教師問卷

* Objectives(Eng) To help the school collect views from teachers, students and parents on learning and teaching, and the major aspects of school work for conducting self-evaluation.

* Objectives(Chi) 幫助學校蒐集教師、家長和學生對學與教及學校工作的意見，作為學校自我評估的參考。

* Start/End Date 2020-06-23 - 2020-07-06

Target Users Teacher [Manual]

Mode Online [Setting](#)

[Cancel Questionnaire](#) [Download Questionnaire](#) [Download User List](#) [Cancel](#) [Save](#)

- 2) If some users have not submitted the above questionnaire after the survey deadline, you may contact the Indicators Section of the EDB to extend the survey end date.

已發布問卷詳情 Screen ID: survey-management-002

目的(中文)

* 開始/結束日期 2021-05-11 - 2021-07-11

目標用戶 教師問卷 [人手]

模式 在線

回應率 69.23% [9/13]

發布者 超級管理員

[取消問卷](#) [下載用戶清單](#) [取消](#) [保存](#)

- 3) You can export the responses to Key Performance Measures (KPM) items when the response rate has reached 100% before the end date or the time for doing the survey has ended (i.e. the current date is after the end date). Select the relevant questionnaire and click “Export to KPM Item”.

System Overview **Survey Management** Screen ID: survey-management-001

Questionnaire Type Select Mode Select [Search](#)

[Export to KPM Item](#)

	Questionnaire Type	Survey Title	Start/End Date	Target Users	Mode	Response Rate	
<input checked="" type="checkbox"/>	Stakeholder Questionnaire	Teacher Questionnaire	2022-02-15 ~ 2022-02-25	Teacher[Manual]	Online	75.93% [41/54]	Content Additional User
<input type="checkbox"/>	Stakeholder Questionnaire	Parent Questionnaire	2022-01-16 ~ 2022-02-28	Parent[Random]	Online	55.11% [124/225]	Content

4.2 Publish Survey

The Stakeholder Surveys will be updated every school year. Therefore, System Administrator must perform a system update before publishing the Stakeholder Survey. For details, please refer to Section 2.5.

Schools may publish online surveys so that target users can use their workstations or tablet computers to do the questionnaires. Offline surveys may be published. The steps to publish an online survey are similar to publish an offline survey, except that checking the “Offline” mode is required. Stakeholders may use paper and pen to do the offline survey. After that, Survey Administrator is required to compile the responses into an Excel file and upload it to the ESDA system. Please refer to Section 4.4 for details.

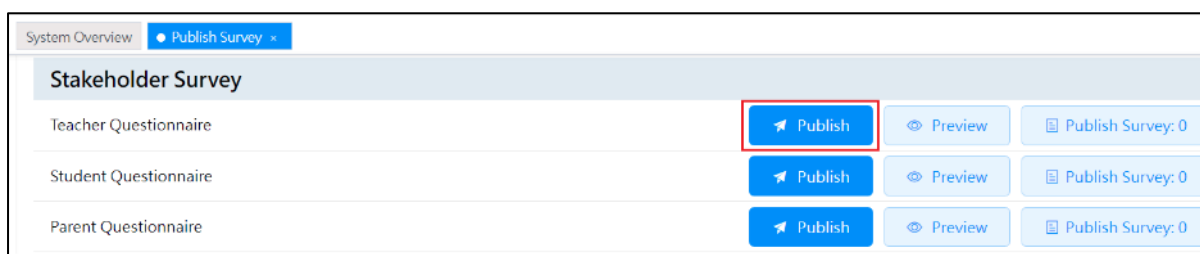
Note:

- 1) To meet the latest security requirement, the effective period for a user password is six months. Users will receive a mandatory request for changing the password and cannot re-use the previous eight passwords.
- 2) For schools publishing questionnaires via online mode, System Administrator may use the function “reset user password” to help users to reset the passwords before publishing the questionnaires, if necessary. Please refer to Section 3.8 for details.

To better manage the questionnaires, schools may publish questionnaires according to odd or even class numbers of the students. The steps for publishing different types of questionnaires to the target respondents are as follows:

4.2.1 Publishing Stakeholder Survey for Teachers

- 1) Click “Survey Management” and then click “Publish Survey”.
- 2) Click “Publish” next to the “Teacher Questionnaire”.



- 3) Click “Select User” to select teachers and click “Setting” to select the mode.
- 4) Enter “Start/End Date” and “Objectives”, and then click “Confirm”.

Publish Survey-Teacher Questionnaire Screen ID: shs-publish-survey-001

[Note(1): You can either select all students or a certain number of randomly selected students from each class level, provided that the number of students in the class level is not less than 35, to ensure that your sample is representative.]

Target Users

====User Group====

Teacher Group

+ Select User

Number of users selected 69

Mode Number of online users : 69 Number of offline users : 0

Setting

* Start/End Date 2022-07-14 - 2022-08-13

Cancel
Confirm

Note:

- (1) The Teacher group is selected by default. You can select additional groups or users by clicking “Select User”.
- (2) The objectives are provided by default. You can change them if necessary.
- (3) The system shows the teacher list within the teacher group. You should ensure that all the teachers (including the principal) are shown in the list. Otherwise, you should select the users by clicking the “Select User”.

4.2.2 Publishing Stakeholder Survey for Students

- 1) Click “Survey Management” and then click “Publish Survey”.
- 2) Click “Publish” next to the “Student Questionnaire”.

System Overview Publish Survey

Stakeholder Survey			
Teacher Questionnaire	Publish	Preview	Publish Survey: 0
Student Questionnaire	Publish	Preview	Publish Survey: 0
Parent Questionnaire	Publish	Preview	Publish Survey: 0

- 3) Click “Select User” to select students and click “Setting” to select the mode.
- 4) Enter “Start / End Date” and “Objectives”, and then click “Confirm”.

Publish Survey-Student Questionnaire Screen ID: shs-publish-survey-001

Number of users selected 0

Mode Number of online users : 0 Number of offline users : 0

[Setting](#)

* Start/End Date 2022-07-14 - 2022-08-13

* Objectives(Eng) To help the school collect views from teachers, students and parents on learning and teaching, and the major aspects of school work conducting self-evaluation. 163/500

* Objectives(Chi) 幫助學校蒐集教師、家長和學生對學與教及學校工作的意見，作為學校自我評估的參考 38/500

Target Respondent(Eng) P.3 - S.6 students

[Cancel](#) [Confirm](#)

Note:

- (1) The system draws students randomly from each class or according to odd or even class numbers of the students. The user list will be shown in the target user list. You can download the user list after publishing the survey.
- (2) The objectives are provided by default. You can change them if necessary.
- (3) For Stakeholder Survey for students in special schools, target users are selected by Survey Administrator.

Tips:

S6 students who have left schools after examinations can be excluded from this survey.

4.2.3 Publishing Stakeholder Survey for Parents

- 1) Click “Survey Management” and then click “Publish Survey”.
- 2) Click “Publish” next to the “Parent Questionnaire”.

System Overview [Publish Survey](#) Screen ID: publish-questionnaire-001

Publish Survey

Assessment Program for Affective and Social Outcomes

【Note (1) : If the number of respondents of a target group for analysis is less than 10, then no statistic will be reported for that scale.】
 【Note (2) : Copyright: All scales and items in APASO-II are subject to the protection of intellectual property rights. In accordance with the agreement of use, the Education Bureau authorized schools in Hong Kong exclusively to use them as a tool to assess students' performance in the affective and social domains in order to collect related data for school self-evaluation. Apart from the above-mentioned purpose, any reproduction, adaptation, distribution or provision of such work with copyright to the public is strictly prohibited. If anyone wants to use these tools for other purposes such as academic research, please contact the original author directly.】

[User Manual](#) [Technical Manual on Scales](#) [Technical Manual on Rasch Measurement](#)

Pre-defined Survey >

User-defined Survey >

Stakeholder Questionnaire

Teacher Questionnaire	Publish	Preview	Publish Survey: 0
Student Questionnaire	Publish	Preview	Publish Survey: 0
Parent Questionnaire	Publish	Preview	Publish Survey: 0

- 3) Click “Select Users” to select parents and click “Setting” to select the mode.
- 4) Enter “Start/End Date” and “Objectives”, and then click “Confirm”.

Note:

- (1) The system draws parents randomly from each class or according to odd or even class numbers of the students. The user list will be shown in the target user list. You can download the user list after publishing the survey.
- (2) All parents of special schools have to fill in the survey. Hence, the system will draw 100% of the parent accounts.

- (3) The English and Chinese Objectives are provided by default. You may change them if necessary.

Tips:

Parents of S6 students who have left schools after examinations can be excluded from the survey.

4.2.4 Publishing Stakeholder Survey for Specialists (For Special Schools only)

- 1) Click “Survey Management” and then click “Publish Survey”.
- 2) Click “Publish” next to the “Specialist Questionnaire”.

System Overview | Publish Survey | Screen ID: publish-questionnaire-001

Assessment Program for Affective and Social Outcomes

[Note (1): If the number of respondents of a target group for analysis is less than 10, then no statistic will be reported for that scale.]
[Note (2): Copyright: All scales and items in ARASO-II are subject to the protection of intellectual property rights. In accordance with the agreement of use, the Education Bureau authorized schools in Hong Kong exclusively to use them as a tool to assess students' performance in the affective and social domains in order to collect related data for school self-evaluation. Apart from the above-mentioned purpose, any reproduction, adaptation, distribution or provision of such work with copyright to the public is strictly prohibited. If anyone wants to use these tools for other purposes such as academic research, please contact the original author directly.]

User Manual | Technical Manual on Scales | Technical Manual on Rasch Measurement

Pre-defined Survey(Special Primary School) >
Pre-defined Survey(Special Secondary School) >
User-defined Survey(Special Primary School) >
User-defined Survey(Special Secondary School) >

Stakeholder Questionnaire

Teacher Questionnaire	Publish	Preview	Publish Survey 0
Student Questionnaire	Publish	Preview	Publish Survey 0
Parent Questionnaire	Publish	Preview	Publish Survey 0
Specialist Questionnaire	Publish	Preview	Publish Survey 0

- 3) Click “Select User” to select specialists and click “Setting” to select the mode.
- 4) Enter “Start/End Date” and “Objectives”, and then click “Confirm”.

Publish Survey-Specialist Questionnaire | Screen ID: sh-publi-survey-002

[Note(1): You can either select all students or a certain number of randomly selected students from each class level, provided that the number of students in the class level is not less than 35, to ensure that your sample is representative.]

Target user: ----User Group----
Specialist Group

+ Select User

Number of users: 34 selected

Mode: Number of online users : 34 Number of offline users : 0

Setting

* Start/End Date: 2022-06-12 - 2022-07-12

* Objectives(Eng): To help the school collect views from teachers, students and parents on learning and teaching, and the major aspects of school work for conducting self-evaluation. 100/100

* Objectives(Chi): 幫助學校蒐集教師、家長和學生對學習和教學工作之意見，作為學校自我評估的參考 100/100

Target: Specialist

Respondent(Eng): Specialist

Target: 專業人員

Respondent(Chi): 專業人員

Cancel Confirm

Note:

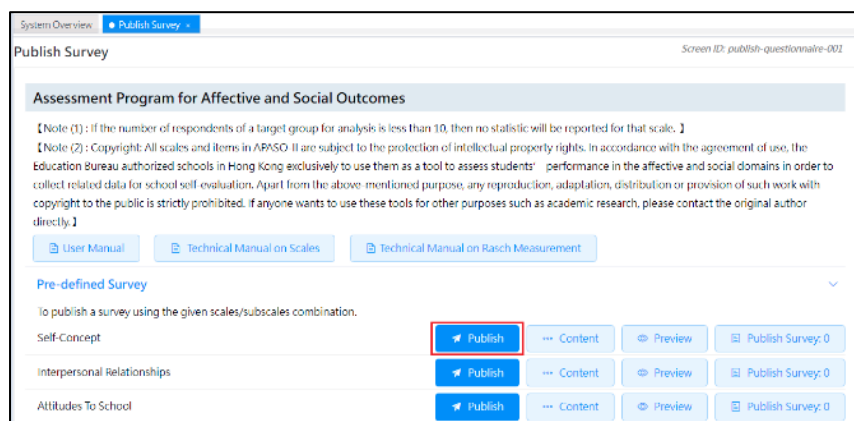
- (1) The Specialist group is selected by default. You can select additional groups or users by clicking “Select User”.
- (2) The objectives are provided by default. You can change them if necessary.
- (3) The system shows the specialist list within the specialist group. You should ensure that all the specialists are shown in the list. Otherwise, you should select the users by clicking the “Select User”.

4.2.5 Publishing APASO Survey

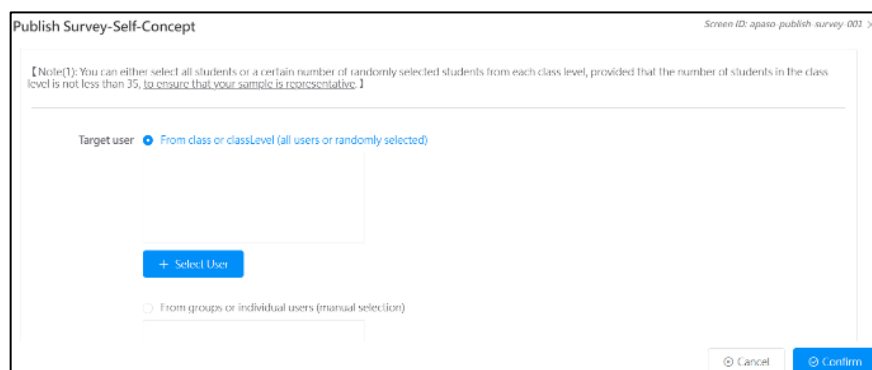
Procedures for publishing APASO-II or APASO-III surveys are the same, which stated as follows:

4.2.5.1 Method 1: Select Target Users from Class or Class Level

- 1) Mouse over “Survey Management” and then click “Publish Survey”.
- 2) Click “Pre-defined Survey” to expand the given scales/subscales combination.
- 3) Click “Publish” next to the APASO surveys (e.g. “Self-Concept”).



- 4) Click the radio button next to “From class or class level (all users or randomly selected)” and then click “Select User”.



- 5) Select “Select User” (All Student, Class Level or Class).
- 6) Choose the “Selected Method” (All users in the selected group, Odd class number, Even class number or Random selection), and then click “Confirm”.

User List

The screenshot shows the 'Select User' dialog box. It has a 'Select User' section with three radio buttons: 'All Students' (selected), 'Class Level', and 'Class'. Below this, there's a 'Selected Method' section with four radio buttons: 'All users in the selected group' (selected), 'Odd class number', 'Even class number', and 'Random selection *'. At the bottom, there's a note: '*The recommended minimum number of users is 35'.

- 7) If “Random selection” is selected, input “Percentage of students to be chosen” and click “Compute”, and then click “Confirm”

User List

Select User

☒ All Students ☐ Class Level ☐ Class

Selected Method

☐ All users in the selected group
☐ Odd class number
☐ Even class number
☒ Random selection *

Percentage of users to be chosen: 50 %

Compute

Number of users chosen: 335

*The recommended minimum number of users is 35

- 8) Click “Setting” to select the mode (“Online User” and “Offline User”).

Publish Survey-Self-Concept

Number of users 38
selected

Mode Number of online users : 38 Number of offline users : 0

Setting

- 9) Select target users and click “< To the left” or “To the right >” to set the mode of response, and then click “Confirm”.

Modifying the Mode of Response

Screen ID: switch-online-Offline-002

☒ Online User 38/39

☐ Offline User 2

Please enter your search content

[5F02] student290
[3H03] student285
[3H03] student273
[4F03] student264
[4A01] student250
[1G03] student267

< To the left To the right >

Please enter your search content

[4G02] student266
[3U01] student244

Cancel

Confirm

10) Enter the “Start/End Date” and “Objectives”, and then click “Confirm”.

* Start/End Date 2022-05-31 - 2022-06-30

* Objectives(Eng)

0/500

* Objectives(Chi)

0/500

Target Respondent(Eng)

Target Respondent(Chi)

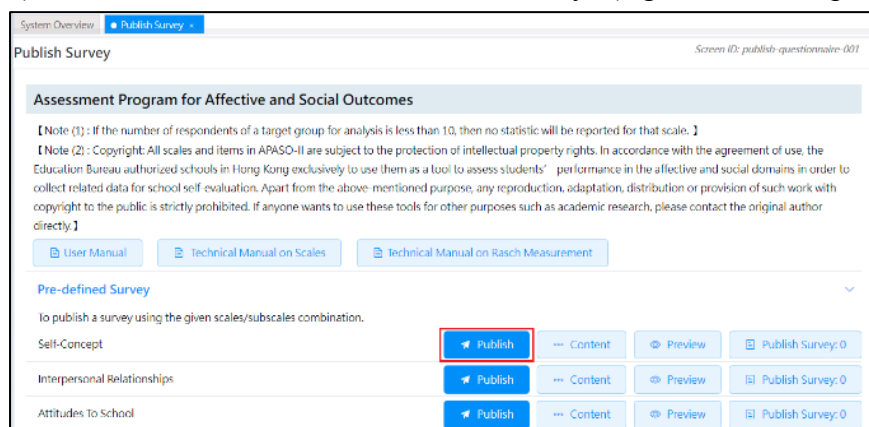
Cancel

Confirm

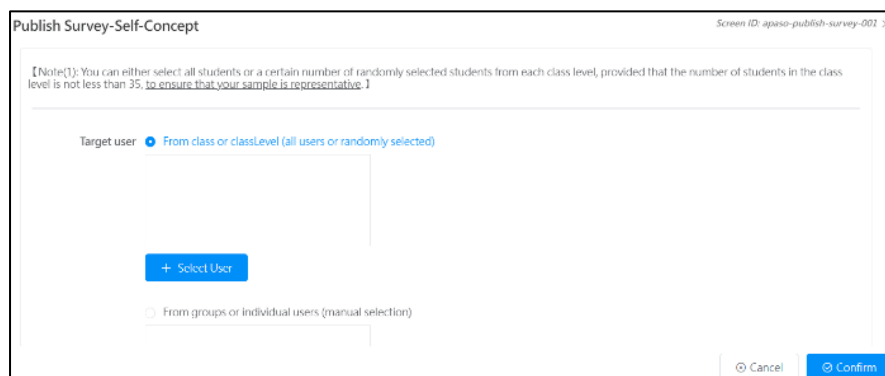
Page 78

4.2.5.2 Method 2: Select Target Users from Group or Individual User

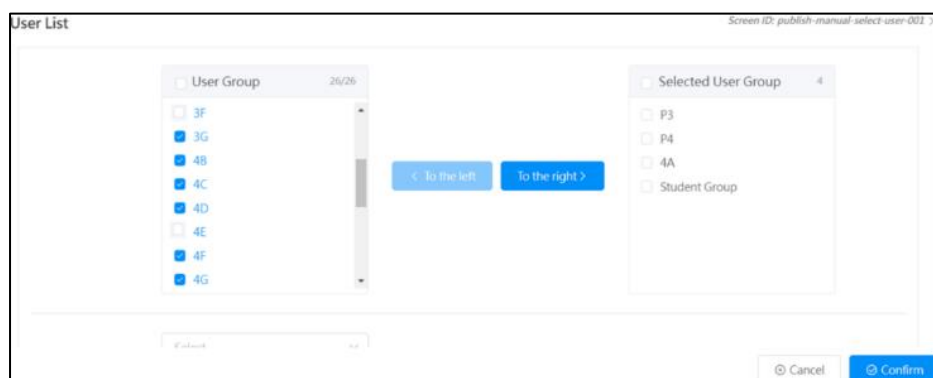
- 1) Mouse over “Survey Management” and then click “Publish Survey”.
- 2) Click “Pre-defined Survey” to expand the given scales/subscales combination.
- 3) Click “Publish” next to the APASO surveys (e.g. “Self-Concept”).



- 4) Method 1: Click the radio button next to “From class or class level (all users or randomly selected)”, and then click “Select User”.



- 5) Method 2: Click the radio button next to “From groups or individual users (manual selection)”, and then click “Select User”.
- 6) Select target target users and click “< To the left” or “To the right >” to set the mode of response, then click “Confirm”.



Note:

The system can only select target users by either method 1 (i.e. “From class or class level”) or method 2 (i.e. “From groups or individual users”), but not both.

Tips:

If schools would like to export the responses of APASO Survey to KPM item “Students’ Attitude to the Nation and School” (for APASO-II of primary schools) or “Affective Development” (for APASO-III of secondary schools), the pre-defined surveys “Students’ Attitude to the Nation and School” and “Affective Development” should be published via the ESDA system. Schools may select all students or not less than half of the students randomly for each class level for the surveys to ensure that the results are representative.

4.2.5.3 Creating School Concerned APASO user-defined Survey

- 1) Click “Survey Management” and then click “Publish Survey”.
- 2) Click “Add Custom Questionnaire” in the “User-defined Survey”.

Assessment Program for Affective and Social Outcomes

[Note (1): If the number of respondents of a target group for analysis is less than 10, then no statistic will be reported for that scale.]

[Note (2): Copyright: All scales and items in APASO-III are subject to the protection of intellectual property rights. In accordance with the agreement of use, the Education Bureau authorized schools in Hong Kong exclusively to use them as a tool to assess students’ performance in the affective and social domains in order to collect related data for school self-evaluation. Apart from the above-mentioned purpose, any reproduction, adaptation, distribution or provision of such work with copyright to the public is strictly prohibited. If anyone wants to use these tools for other purposes such as academic research, please contact the original author directly.]

[Note (3): To allow the export of survey results as KPM 17 data through the system, schools must use “Affective Development (Applicable to KPM 17)” in the Pre-defined Survey.]

[User Manual](#)[Technical Manual on Scales](#)

Pre-defined Survey

User-defined Survey

[Add User-defined Survey](#)

- 3) Select subscales items.
- 4) Enter the survey title and objective, and click “Submit”.

Screen ID: publish-questionnaire-009

* Survey Title(EN) 0/100

* Survey Title(ZH) 0/100

Questionnaire objective(Eng) 0/100

Questionnaire objective(Chi) 0/100

Total no. of items* 31

The total number of items should not exceed 100.

[Submit](#)

Scale	Sub Scale	Item Count
	<input type="checkbox"/> SEMO - Emotional Stability	8
	<input checked="" type="checkbox"/> SCAL - General	5
	<input type="checkbox"/> SIICNI - Honesty / Trustworthiness	8

- 5) If “To collect students’ and their families’ background information” is selected in APASO-III, read the statement and click “Confirm”.

The screenshot shows a selection interface with the following items:

- ☒ National and Global: Global Competence
- ☒ AWACOM - Intercultural Communication 4
- ☒ RESPECT - Respect People of Different Cultural B. 3
- ☒ PERSPECT - Multi-perspective Thinking 3

Other Optional Items

- ☒ To collect students' and their families' background information

Prompt

Optional Items
Schools should consider their school context and the need for schools' self-evaluation to decide whether this optional part in the questionnaire should be included. For example, there is a need to know more about the performance of students with different socio-economic status (SES) in the affective and social domain. It should be noted that the information collected in this part includes the background and personal information on students' places of birth, parents' or guardians' educational and employment background, migrant status, etc. There would be around 40 items. Please confirm whether you will continue to select it.

- 6) Select the combination of subscales and click “Confirm”.

Survey Area	Subscale	No. of Items
<input type="checkbox"/> Family Socioeconomic Status	<input type="checkbox"/> HOMRES - Family Possession (General Items)	3
	<input type="checkbox"/> CULTPOSS - Family Possession (Cultural)	4
	<input type="checkbox"/> HEDRES - Family Possession (Study)	4
	<input type="checkbox"/> WEALTH - Family Possession (Wealth)	3
	<input type="checkbox"/> ICTRES - Family Possession (Information Technol)	3
	<input type="checkbox"/> BOOKS - Family Possession (Number of Books)	1
	<input type="checkbox"/> STUDESK - Family Possession (Study Table)	1
	<input type="checkbox"/> ROOM - Family Possession (Own Room)	1
	<input type="checkbox"/> HISEI - Parents' Highest Job Status	2
	<input type="checkbox"/> HISCED - Parents' Highest Education Level	2
<input type="checkbox"/> Immigrant Status	<input type="checkbox"/> IMMIGS - Student Born in Hong Kong	1
	<input type="checkbox"/> IMMIGM - Mother Born in Hong Kong	1
	<input type="checkbox"/> IMMIGF - Father Born in Hong Kong	1

4.2.5.4 Publishing a user-defined survey

- 1) Click “Survey Management” and then click “Publish Survey”.
- 2) User-defined surveys that were created before will be displayed.
- 3) Click “Publish” button next to the survey.

Assessment Program for Affective and Social Outcomes

[Note (1): If the number of respondents of a target group for analysis is less than 10, then no statistic will be reported for that scale.]

[Note (2): Copyright: All scales and items in APASO-III are subject to the protection of intellectual property rights. In accordance with the agreement of use, the Education Bureau authorized schools in Hong Kong exclusively to use them as a tool to assess students' performance in the affective and social domains in order to collect related data for school self-evaluation. Apart from the above-mentioned purpose, any reproduction, adaptation, distribution or provision of such work with copyright to the public is strictly prohibited. If anyone wants to use these tools for other purposes such as academic research, please contact the original author directly.]

[Note (3): To allow the export of survey results as KPM 17 data through the system, schools must use "Affective Development (Applicable to KPM 17)" in the Pre-defined Survey.]

[User Manual](#)

[Technical Manual on Scales](#)

Pre-defined Survey

User-defined Survey

[Add User-defined Survey](#)

Note:

- (1) Same survey title cannot be used;
- (2) Each user defined survey shall not contain more than 100 questions.

4.2.6 Publishing ESR Questionnaire

This questionnaire is only applicable to schools that have undergone ESR in that school year.

- 1) Click “Survey Management” and then click “Publish Survey”.
- 2) Click “Publish” next to the “Questionnaire on ESR”.

Inspection Survey	
Questionnaire on ESR	<div><div>Publish</div><div>Publish Survey: 0</div></div>
Questionnaire on Post-EI	<div><div>Publish</div><div>Publish Survey: 0</div></div>
Questionnaire on Comprehensive Review	<div><div>Publish</div><div>Publish Survey: 0</div></div>
Questionnaire for School Development and Accountability Framework	<div><div>Publish</div><div>Publish Survey: 0</div></div>

- 3) Enter a password and click “Confirm”. The ESR team leader will provide the password when the draft ESR report is issued to the school by mail.

Verify Password-Questionnaire on ESR

Screen ID: publish-questionnaire-005

Optional Online Survey

Post-ESR Survey - 2022-05-01 ~ 2023-05-31

Password

Confirm

Close

- 4) Click ”Extract Online User” to select target users and then click “Confirm”.

Publish Online Questionnaire

Screen ID: publish-questionnaire-005

Survey Title (English)

Survey Title (Chinese)

Objectives(English)

Objectives(Chinese)

Start-End Date

2022-01-25 - 2022-01-27

Online User

Extract Online User

Cancel

Confirm

Note:

Schools can select target users but not the Start/End Date of the questionnaire. The questionnaire should be completed within four weeks.

4.2.7 Publishing FI Questionnaire

This questionnaire is only applicable to schools that have undergone FI in that school year.

- 1) Click “Survey Management” and then click “Publish Survey”.
- 2) Click “Publish” next to the “Questionnaire on FI”.



Inspection Survey		
Questionnaire on ESR	 Publish	 Publish Survey: 0
Questionnaire on FI	 Publish	 Publish Survey: 0
Questionnaire on Comprehensive Review	 Publish	 Publish Survey: 0
Questionnaire for School Development and Accountability Framework	 Publish	 Publish Survey: 0

- 3) Enter a password and click “Confirm”. The password will be available in the EDB letter.

Verify Password-Questionnaire on Post-FI
Screen ID: publish-questionnaire-005 X

* Optional Online Survey ☐ Questionnaire on Focus Inspection (FI) - 2021-10-28 ~ 2022-12-31

* Password

 Confirm
 Close

- 4) Click “Extract Online User” to select target users and then click “Confirm”.

Publish Online Questionnaire
Screen ID: publish-questionnaire-005 X

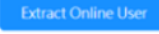
Survey Title (En FI glish)



Survey Title (Ch FI inese)

Objectives(Eng) FI

Objectives(Chi) FI

Start-End Date -

Online User 

 Cancel
 Confirm

Note:

Schools shall check the Start/End Date of the questionnaire. The questionnaire should be completed within the specified period.

4.2.8 Publishing CR Questionnaire

- 1) Click “Survey Management” and then click “Publish Survey”.
- 2) Click “Publish” next to the “Questionnaire on Comprehensive Review”.

Inspection Survey	
Questionnaire on ESR	Publish Publish Survey: 0
Questionnaire on Post-FI	Publish Publish Survey: 0
Questionnaire on Comprehensive Review	Publish Publish Survey: 0
Questionnaire for School Development and Accountability Framework	Publish Publish Survey: 0

- 3) Enter a password and click “Confirm”. The password will be available in the EDB letter.

Key in the password to publish the Post-CR Survey

Screen ID: publish-questionnaire-005 ×

* Optional Online Survey ☐ Questionnaire on Comprehensive Review (CR)

* Password

[Confirm](#) [Close](#)

- 4) Click “Extract Online User” to select target users and then click “Confirm”.

Publish Online Questionnaire

Screen ID: publish-questionnaire-005 ×

Survey Title (En CR
glish)

Survey Title (Ch CR
inese)

Objectives(Eng) CR

Objectives(Chi) CR

Start-End Date -

Online User [Extract Online User](#)

[Cancel](#) [Confirm](#)

4.2.9 Publishing SDA Questionnaire

- 1) Click “Survey Management” and then click “Publish Survey”.
- 2) Click “Publish” next to the “Questionnaire for School Development and Accountability Framework”.

Inspection Survey		
Questionnaire on ESR	Publish	Publish Survey: 0
Questionnaire on Post-FI	Publish	Publish Survey: 0
Questionnaire on Comprehensive Review	Publish	Publish Survey: 0
Questionnaire for School Development and Accountability Framework	Publish	Publish Survey: 0

- 3) Enter a password and click “Confirm”. The password will be available in the EDB letter.

Verify Password- questionnaire survey

Screen ID: publish-questionnaire-005 ✕

* Password

Required item cannot be blank.

Confirm

Close

- 4) Click “Extract Online User” to select target users and then click “Confirm”.

Publish Online Questionnaire

Screen ID: publish-questionnaire-005 ✕

Survey Title

Set A : School Heads, Teachers and Specialists

(English)

Survey Title

問卷甲：校長、教師及專責人員

(Chinese)

Objectives (Eng)

Set A : School Heads, Teachers and Specialists

Objectives (Chi)

問卷甲：校長、教師及專責人員

Start/End Date

2022-08-23

-

2022-09-23

Online User

Extract Online User

Cancel

Confirm

Note:

Schools shall check the Start/End Date of the questionnaire. The questionnaire should be completed within the specified period.

4.2.10 Publish School-based Survey

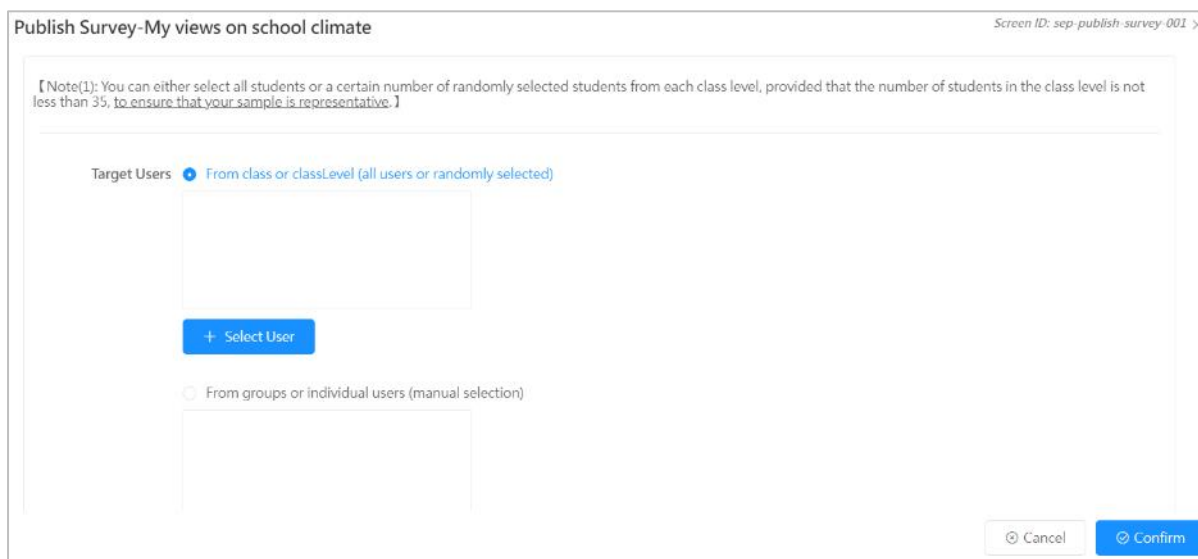
4.2.10.1 Method 1: Select Target Users from Class or Class Level

- 1) Mouse over “Survey Management” and then click “Publish Survey”.
- 2) Click “Publish” next to the School-based survey.



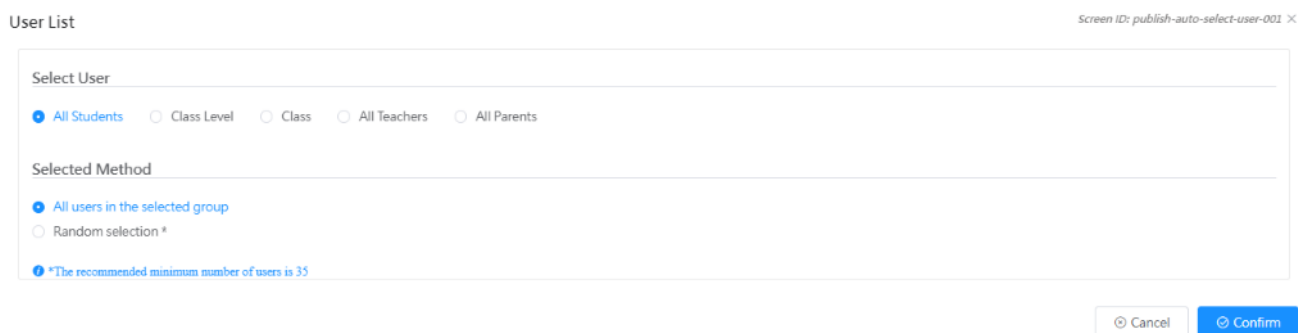
The screenshot shows a web interface with a tab labeled 'Publish Survey'. Below the tab is a table with two rows of survey data. The first row is 'Self-defined QA 2022-23' and the second row is 'My views on school climate'. Each row has a 'Publish' button (with a star icon) and a 'Preview' button. To the right of the 'Preview' buttons, there are counters for 'Published Survey: 1' and 'Published Survey: 0'.

- 3) Click the radio button next to “From class or class level (all users or randomly selected)” and then click “Select User”.



The screenshot shows a dialog box titled 'Publish Survey-My views on school climate'. It contains a note: '【Note(1): You can either select all students or a certain number of randomly selected students from each class level, provided that the number of students in the class level is not less than 35, to ensure that your sample is representative.】'. Below the note, there are two radio buttons. The first radio button is selected and labeled 'From class or classLevel (all users or randomly selected)'. Below this radio button is a large empty rectangular box and a blue button labeled '+ Select User'. The second radio button is labeled 'From groups or individual users (manual selection)' and is not selected. At the bottom right of the dialog box are 'Cancel' and 'Confirm' buttons.

- 4) Select “Select User” (“All Students”, “Class Level”, “Class”, “All Teachers” or “All Parents”).
- 5) Choose the “Selected Method” (“All users in the selected group” or “Random selection”), and then click “Confirm”.



The screenshot shows a dialog box titled 'User List'. It has two sections. The first section is 'Select User' and contains five radio buttons: 'All Students' (selected), 'Class Level', 'Class', 'All Teachers', and 'All Parents'. The second section is 'Selected Method' and contains two radio buttons: 'All users in the selected group' (selected) and 'Random selection *'. At the bottom of the dialog box, there is a blue information icon followed by the text '*The recommended minimum number of users is 35'. At the bottom right are 'Cancel' and 'Confirm' buttons.

- 6) If “Random selection” is selected, input “Percentage of users to be chosen” and click “Compute”, and then click “Confirm”

Screen ID: publish-auto-select-user-001

User List

Select User

☒ All Students

☐ Class Level

☐ Class

☐ All Teachers

☐ All Parents

Selected Method

☐ All users in the selected group

☒ Random selection *

Percentage of users to be chosen: 50 %

Number of users chosen: 335

Compute

*The recommended minimum number of users is 35

- 7) Click “Setting” to select the mode (“Online User” and “Offline User”).

Publish Survey-My views on school climate

+ Select User

Number of users 331
selected

Mode Number of online users : 331 Number of offline users : 0

⚙ Setting

* Start/End Date

📅 2022-11-06

-

📅 2022-12-06

- 8) Select target users and click “< To the left” or “To the right >” to set the mode of response, and then click “Confirm”.

Modifying the Mode of Response

Screen ID: switch-online-Offline-001

☒ Online User36/36

☒ [6B02] student290

☒ [5F03] student285

☒ [5B03] student273

☒ [4F03] student264

☒ [4A01] student250

☒ [4G03] student267

< To the left

To the right >

☐ Offline User2

☐ [4G02] student266

☐ [3D01] student244

Cancel

Confirm

9) Enter the “Start/End Date” and “Objectives”, and then click “Confirm”.

Publish Survey-My views on school climate

Screen ID: xep-publish-survey-001

* Start/End Date: 2022-11-06 - 2022-12-06

Objectives (English): 0/500

Objectives (Chinese): 0/500

Target Respondent: Based on the selected 'target user'

(Eng)

Target Respondent: 根據已選的'目標用戶'

(Chi)

4.2.10.2 Method 2: Select Target Users from Group or Individual User

- 1) Mouse over “Survey Management” and then click “Publish Survey”.
- 2) Click “Publish” next to the School-based survey.
- 3) Click the radio button next to “From groups or individual users (manual selection)”, and then click “Select User”.

Publish Survey-My views on school climate

Screen ID: xep-publish-survey-001

☒ From groups or individual users (manual selection)

Number of users: 0

selected

Mode: Number of online users: 0 Number of offline users: 0

- 4) Select target users from “User Group”/”User List” and click “< To the left” or “To the right >” to select users and then click “Confirm” to complete the user selection.

User List

Screen ID: publish-manual-select-user-001

☐ User Group 29

☐ S3

☐ S4

☐ S5

☐ S6

☐ 1A

☐ 1B

☐ 1C

☐ 1D

☐ Selected User Group 2

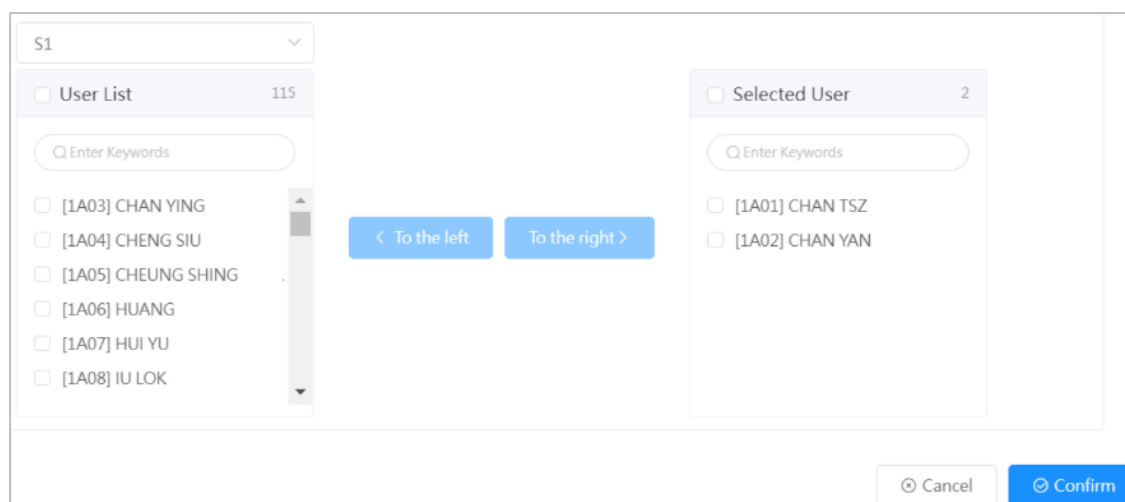
☐ S1

☐ S2

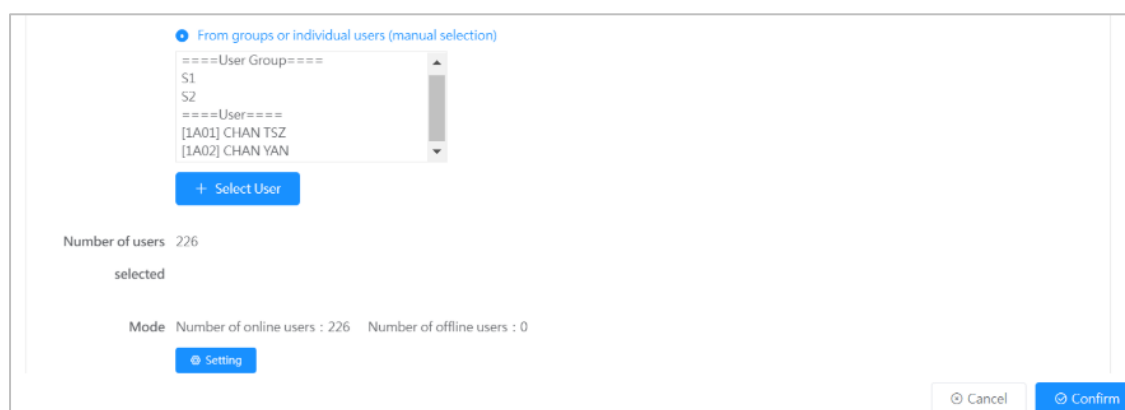
S1

☐ User List 113

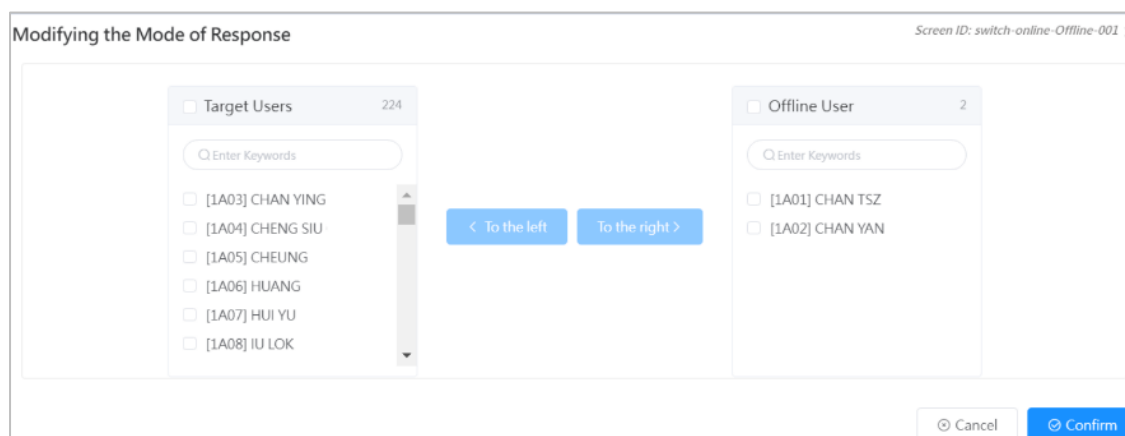
☐ Selected User 2



5) Click “Setting” to select the mode (“Online User” and “Offline User”).



6) Select target users and click “< To the left” or “To the right >” to set the mode of response, and then click “Confirm”.



7) Enter the “Start/End Date” and “Objectives”, and then click “Confirm”.

Publish Survey-My views on school climate Screen ID: sep-publish-survey-001

[Setting](#)

* Start/End Date -

Objectives (English) 0/500

Objectives (Chinese) 0/500

Target Respondent Based on the selected 'target user'

(Eng)

Target Respondent 根據已選的「目標用戶」

(Chi)

[Cancel](#) [Confirm](#)

Note:

Schools shall check the Start/End Date of the questionnaire. The questionnaire should be completed within the specified period.

4.3 Manage Survey

4.3.1 Download User List

Schools may distinguish the users who responded the survey. The following steps show the way to download a user list of a survey in progress:

System Overview

Survey Management

Export To School Performance Appraisal Project

	Questionnaire Type	Survey Title	Start/End Date	Target Users	Mode	Response Rate	
<input type="checkbox"/>	Stakeholder Questionnaire	Teacher Questionnaire	2022-04-29 ~ 2022-05-13	Teacher[Manual]	Online	100% [22/22]	<div>ContentAdditional User</div>
<input type="checkbox"/>	Stakeholder Questionnaire	Parent Questionnaire	2022-04-29 ~ 2022-06-30	Parent[]	Offline	81.54% [53/65]	<div>Content</div> <div>Offline Data Import</div> <div>Additional User</div>

1) Mouse over “Survey Management” and then click “Manage Survey”.

2) Click “Content” next to the targeted questionnaire.

3) Click “Download User List”.

Questionnaire Details Published

Screen ID: survey-management-002 X

Survey Title (English) Student Questionnaire

Survey Title (Chinese) 學生問卷

* Objectives(Eng) To help the school collect views from teachers, students and parents on learning and teaching, and the major aspects of school work for conducting self-evaluation.

* Objectives(Chi) 幫助學校蒐集教師、家長和學生對學與教及學校工作的意見，作為學校自我評估的參考。

* Start/End Date 2022-04-28 - 2022-05-13

Cancel Questionnaire

Download Questionnaire

Download User List

Cancel

Save

Note:

The user list contains the target user list and the submission status of each target user. If a target user submits the questionnaire through online submission, the submission status indicates whether the target user has submitted the questionnaire or not.

4.3.2 Update Start / End Date

Schools may change the start / end date through the following steps:

- 1) Mouse over “Survey Management” and then click “Manage Survey”.
- 2) Click “Content” next to the targeted questionnaire.
- 3) Select the Start/End Date and click “Save”.

Questionnaire Details Published

Screen ID: survey-management-002 X

* Objectives(Eng) To help the school collect views from teachers, students and parents on learning and teaching, and the major aspects of school work for conducting self-evaluation.

* Objectives(Chi) 幫助學校蒐集教師、家長和學生對學與教及學校工作的意見，作為學校自我評估的參考。

* Start/End Date 2022-04-29 - 2022-06-30

Target Users Parent []

Mode Offline

Setting

Cancel Questionnaire

Download Questionnaire

Download User List

Cancel

Save

Tips:

If you want to close the questionnaire survey, you can set the end date earlier than the current date.

4.3.3 Cancel Survey

Schools may cancel the published survey.

- 1) Mouse over “Survey Management” and then click “Manage Survey”.
- 2) Click “Content” next to the targeted questionnaire.
- 3) Click “Cancel Questionnaire”.

Questionnaire Details Published Screen ID: survey-management-002

* Objectives(Eng) To help the school collect views from teachers, students and parents on learning and teaching, and the major aspects of school work for conducting self-evaluation.

* Objectives(Chi) 幫助學校蒐集教師、家長和學生對學與教及學校工作的意見，作為學校自我評估的參考。

* Start/End Date 2022-04-29 - 2022-06-30

Target Users Parent []

Mode Offline [Setting](#)

[Cancel Questionnaire](#) [Download Questionnaire](#) [Download User List](#) [Cancel](#) [Save](#)

- 4) For a survey with more than 0% response rate, input the number of users who completed the questionnaires and click “Confirm” to cancel the survey.

Number of completed Screen ID: survey-management-006

* Number of completed

[Confirm](#) [Cancel](#)

4.3.4 Download Questionnaire

When the school chooses to publish the questionnaire in offline mode, the school can download and distribute the questionnaire to the target users as follows:

- 1) Mouse over “Survey Management” and then click “Manage Survey”.
- 2) Click “Content” next to the Teacher / Student / Parent questionnaire.
- 3) Click “Download Questionnaire”.

Questionnaire Details Published Screen ID: survey-management-002 X

Survey Title (English) Teacher Questionnaire

Survey Title (Chinese) 教師問卷

* Objectives(Eng) To help the school collect views from teachers, students and parents on learning and teaching, and the major aspects of school work for conducting self-evaluation.

* Objectives(Chi) 幫助學校蒐集教師、家長和學生對學與教及學校工作的意見，作為學校自我評估的參考。

* Start/End Date 2022-04-29 - 2022-05-13

4.4 Importing Offline Survey Responses

Survey Administrator may publish ESDA survey in offline mode. Respondents may fill in the survey by means of paper and pen. Data are then manually input into the ESDA system.

Data Operator shall complete the following tasks:

- 1) Collect offline survey responses (e.g. hard copies).
- 2) Mouse over “Survey Management” and then click “Manage Survey”. Download a csv template by clicking “Offline Data Import” on the right side of the related questionnaire.

System Overview **Survey Management** Screen ID: survey-management-001

Questionnaire Type Mode

	Questionnaire Type	Survey Title	Start/End Date	Target Users	Mode	Response Rate	
<input type="checkbox"/>	Stakeholder Questionnaire	Parent Questionnaire	2021-03-23 ~ 2021-05-23	Parent[Random]	Offline	58.29% [369/633]	<input type="button" value="Content"/> <input type="button" value="Offline Data Import"/>

3) Click “Download CSV Template” to export the file.

Import StakeHolder Survey Screen ID: survey-management-003

Questionnaire Parent Questionnaire

Name

Import Mode ☒ Append ☐ Replace

Excel File Select File

If you want to remove all imported responses from the system before importing the new records, please select "Replace" in "Import Mode".
Last Submission Date : 2021-03-23

Import Download CSV Template Cancel

4) Input data and save the Excel file.

	A	B	C	D	E	F	G	H
1	School Year	Login Name	Name (Chinese)	Name (English)	Class Code	Gender	Height/CM	Weight/KG
2	2021-22	student201	student201	student201	1A	F	100	30
3	2021-22	student202	student202	student202	1A	F		
4	2021-22	student203	student203	student203	1A	M		
5	2021-22	student204	student204	student204	1A	M		
6	2021-22	student208	student208	student208	1B	F		
7	2021-22	student209	student209	student209	1B	M		
8	2021-22	student210	student210	student210	1B	M		
9	2021-22	student211	student211	student211	1C	F		

5) Import the saved Excel file to ESDA. Select “Append” or “Replace”. Uploaded data will be kept if “Append” is selected or will be replaced if “Replace” is selected.

Import StakeHolder Survey Screen ID: survey-management-003

Questionnaire Parent Questionnaire

Name

Import Mode ☒ Append ☐ Replace

Excel File Select File

If you want to remove all imported responses from the system before importing the new records, please select "Replace" in "Import Mode".
Last Submission Date : 2021-03-23

Parent Questionnaire.xlsx

Import Download CSV Template Cancel

Note:

If you want to remove all imported responses from the system before importing the new records, please select “Replace” in “Import Mode” and then click “Import”.

- 6) Click “Select File” to select a suitable file to be uploaded and click “Import”.
- 7) When all responses have been stored into ESDA, export the results to KPM Item.

4.5 Export Survey Responses to KPM Items

4.5.1 Export Stakeholder Survey Responses to KPM Items

System Overview

Survey Management

Screen ID: survey-management-001

Questionnaire Type

Stakeholder Survey

Mode

Select

Q Search

Export to KPM Item

✓	Questionnaire Type	Survey Title	Start/End Date	Target Users	Mode	Response Rate	
<input checked="" type="checkbox"/>	Stakeholder Survey	Teacher Questionnaire	2022-02-15 ~ 2022-02-25	Teacher[Man...	Online	75.93% [41/54]	<div>Content</div> <div>Additional User</div>

- 1) Mouse over “Survey Management” and then click “Manage Survey”.
- 2) Check the checkbox(es) for those questionnaires to be exported. You may export more than one questionnaire at the same time.
- 3) Click “Export to KPM Item”.

Note:

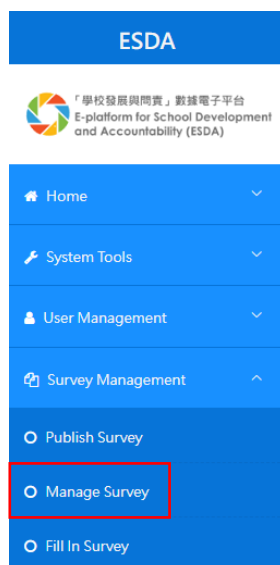
It is recommended to export the KPM Items after you have imported all responses from target respondents. However, you can export the KPM Items again in case the data is updated.

4.5.2 Export APASO Survey Responses to KPM Item

Note:

- 1) Schools may publish APASO questionnaires several times in the same school year but should be at least 6 months apart from each release to the same group for the same survey.
- 2) Schools should extract data which covering students in all class levels (P3-6 for primary schools, secondary schools may choose whether to cover S6 students or not) and not less than half of the students from any one time frame to KPM item. Operation steps are as follows:

1) Click “Manage Survey”.



2) Click the left box of the target survey (e.g. “Students’ Attitudes toward the Nation and School” (applicable to APASO-II for primary schools), or “Affective Development” (applicable to APASO-III for secondary schools)), for “Pre-defined Survey” only.

3) Click “Export To KPM Item” (Note: Only one “Students’ Attitudes toward the Nation and School” or “Affective Development” survey can be selected for each school year.).

System Overview

Survey Management

Survey Management

Screen ID: survey-management-001

Questionnaire Type

Select

Mode

Select

Q Search

Export to KPM Item

	Questionnaire Type	Survey Title	Start/End Date	Target Users	Mode	Response Rate	
<input checked="" type="checkbox"/>	Stakeholder Questionnaire	Teacher Questionnaire	2022-02-15 ~ 2022-02-25	Teacher[Manual]	Online	75.93% [41/54]	<div>Content</div> <div>Additional User</div>
<input type="checkbox"/>	Stakeholder Questionnaire	Parent Questionnaire	2022-01-16 ~ 2022-02-28	Parent[Random]	Online	55.11% [124/225]	<div>Content</div>

Tips:

If you wish to export the survey responses to the KPM item “Students’ attitudes toward the Nation and School” (applicable to APASO-II for primary schools), or “Affective Development” (applicable to APASO-III for secondary schools), you should publish the pre-defined survey “Students’ Attitudes toward Nation and School” or “Affective Development”. You can either select all students or a certain number of randomly selected students from each class level, provided that the number of students at the class level is not less than half, to ensure that your sample is representative.

4.5.3 Export APASO-III User-defined Survey Responses to KPM Item

The system can only export the pre-defined survey of APASO to KPM item. If school is planning to use the user-defined surveys to collect data including “Affective Development (Applicable to KPM17)” and other subscales, System Administrator may follow the steps below to export the results of one or more user-defined survey(s) to KPM.

- 1) After students completing the questionnaires, System Administrator presses “APASO- III Report” under “Report Management”. Then, select “Year Report” for the “Report Type”. Press “Export Whole School Raw Data” after choosing appropriate survey information.
- 2) Repeat Step 1, if school publish more than one user-defined surveys to collect the raw data for “Affective Development (Applicable to KPM17)”.
- 3) Publish a pre-defined survey “Affective Development (Applicable to KPM17)” according to Section 4.2.5.
- 4) Combine all the raw data from Steps 1 and 2 above. Import the respondents’ information and the first 59 responses to the offline template in Step 3.
- 5) Export the data to KPM item according to Section 4.5.2.

4.6 Fill In Survey

About Fill in Survey

After login, the user can view a list of surveys that are assigned to him/her. Upon completing a survey, the user can click the “Confirm” button to save his/her responses in the system. For Stakeholder Survey, the respondents are anonymous, and all survey items are compulsory. Users must fill in all survey items before submitting the responses. For APASO surveys, the respondents are also anonymous, but the survey items are not compulsory. In the first survey submission, the system will alert the users about un-filled survey items and highlight these items by changing their background color.

Before You Begin

To fill in an online survey, your account should possess a “Fill In Survey” privilege. If you cannot access the “Fill In Survey”, please consult your System Administrator to acquire the privilege.

Best Practices

The system pops up a new window when you start to complete a questionnaire. Not clicking any button at the top of the original window is recommended when doing an online survey in ESDA.

Survey Administrator or users, including teachers, students and parents, can complete the survey via desktop or tablet computer. The following sections provide a brief description of how to fill in the surveys:

4.6.1 Filling in Stakeholder Survey

- 1) Click “Survey Management” and then click “Fill In Survey”.
- 2) Click “View” next to the target survey at Pending survey.

Survey/Questionnaire

Screen ID: survey-questionnaire-001

Pending survey

School Year	Questionnaire Title	Purpose	Start/End Date	Mode	
2015-16	Questionnaire on ESR		2015-12-18 ~ 2016-01-18	Online	
2021-22	Teacher Questionnaire	To help the school collect views from teachers, students and parents on learning and teaching, and the major aspects of school work for conducting self-evaluation.	2022-05-26 ~ 2022-06-25	Online	View

- 3) View the instructions and then click “Begin”.

Questionnaire Title: Teacher Questionnaire

Screen ID: survey-questionnaire-003

Guidelines for Stakeholder Questionnaire

This questionnaire is anonymous and all questions must be answered. If you have not answered any questions when submitting this questionnaire, the system will alert you. Please return and answer any questions you have not answered.

It will take about 15-20 minutes to complete the questionnaire.

[Begin](#)

- 4) Fill in the survey and click “Submit”.

Questionnaire Title: Teacher Questionnaire

Screen ID: survey-questionnaire-003

Years of teaching: I have taught in this school for (Select one of individual 6 months or more counts as 1 year; less than 6 months counts as 0 years; as at the time of questionnaire submission, a teacher having taught for 5 years and 7 months should select the option "5 years", a teacher having taught for 5 years and 6 months should select the option "6-10 years").

0-1 years 6-10 years 11 years or above

☒ ☐ ☐

I My views on school management

Item	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	Don't know / NA
1. The school has a clear direction of development.	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. The school strategically formulates its development plans in line with its directions of development.	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. The school's decision-making process is transparent.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. The school monitors its work attentively.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. The school systematically collects data on Learning and Teaching with a view to monitoring students' performance and progress.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. The school actively reports to teachers, students and parents results of its self-evaluation.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

If My views on principal's professional leadership

Item	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	Don't know / NA
7. The principal provides effective guidance to the management and the school.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

[Cancel](#) [Submit](#)

Note:

You must respond to all questions. Otherwise, you cannot submit the questionnaire.

4.6.2 Filling in APASO Survey

- 1) Click “Survey Management” and then click “Fill In Survey”.
- 2) Click “View” next to the target survey at Pending survey.

Survey/Questionnaire Screen ID: survey-questionnaire-001

Pending survey

School Year	Questionnaire Title	Purpose	Start/End Date	Mode	
2021-22	Independent Learning Capacity	Independent Learning Capacity	2022-06-12 ~ 2022-07-12	Online	View

- 3) View the instructions and then click “Begin”.

Questionnaire Title: Independent Learning Capacity Screen ID: survey-questionnaire-002 X

Assessment Program for Affective and Social Outcomes

This questionnaire is anonymous. When you submit this questionnaire for the first time, if you have any questions that have not been answered, the system will display them in a different background color. The second time you submit this questionnaire, the system will still show you the unfinished questions, but you can still choose to submit.

[Begin](#)

- 4) Fill in the survey and click “Submit”.

Questionnaire Title: Independent Learning Capacity Screen ID: survey-questionnaire-002 X

I. Academic Affect

Item	Strongly disagree	Disagree	Agree	Strongly agree
1. I go to school for knowledge.	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Even if I do not like a subject, I still work hard on it.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
3. I want to do my best at school.	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. In order to learn more, I will not be absent from school without a valid reason.	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. I find learning at school interesting.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

II. Academic Initiation

Item	Strongly disagree	Disagree	Agree	Strongly agree
6. I am proactive in exploring new issues.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
7. I like taking the initiative to look for answers on matters that I do not understand.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
8. I like taking the initiative to gather information.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
9. I like taking the initiative to answer teachers' questions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
10. I like taking the initiative to join in discussion.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

III. Academic Monitoring

[Cancel](#) [Submit](#)

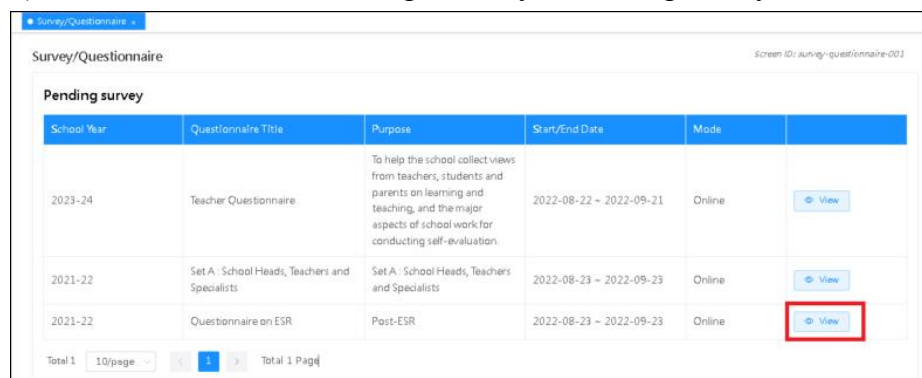
Note:

You are allowed to submit the questionnaire without responding to all questions. However, the system will alert you to any un-filled questions in the first submission. The system will alert you again in the second submission on any un-filled questions, but you can still submit the questionnaire.

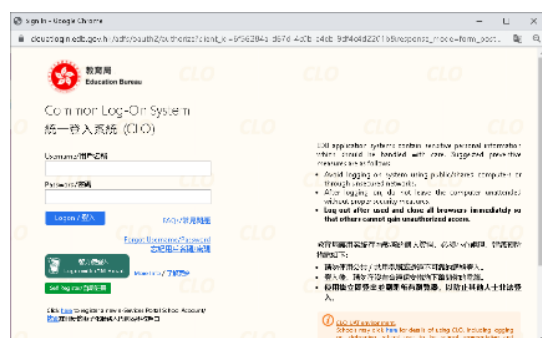
4.6.3 Filling in ESR Questionnaire

When a school has undergone External School Review, the principal and teachers are invited to fill in the ESR Questionnaire.

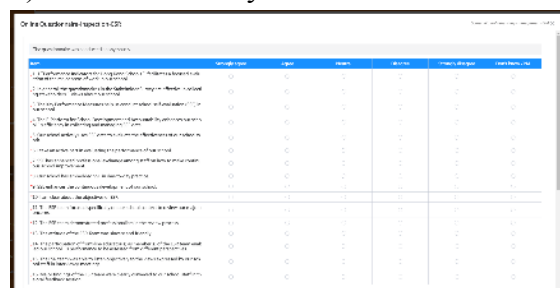
- 1) Click “Survey Management” and then click “Fill In Survey”.
- 2) Click “View” next to the target survey at Pending survey.



- 3) Common Log-On System (CLO) authentication is required for filling in the survey. The following screen will be shown for the first time logging in. This step will be skipped afterward.



- 4) Fill in the survey and click “Submit”.



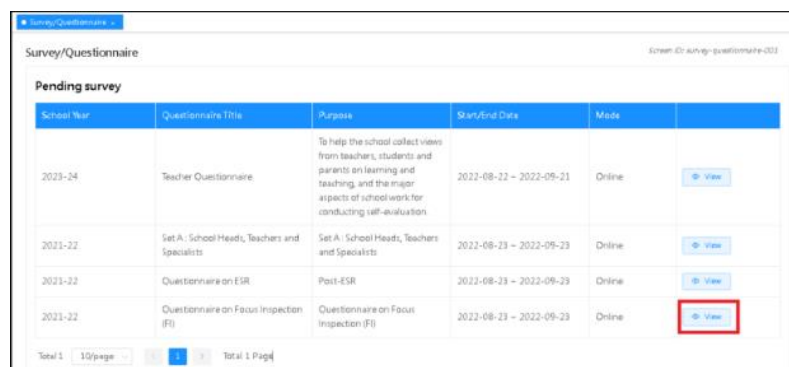
Note:

If you cannot load the questionnaire or cannot submit the questionnaire, please contact your System Administrator to check the Internet connection of the ESDA server.

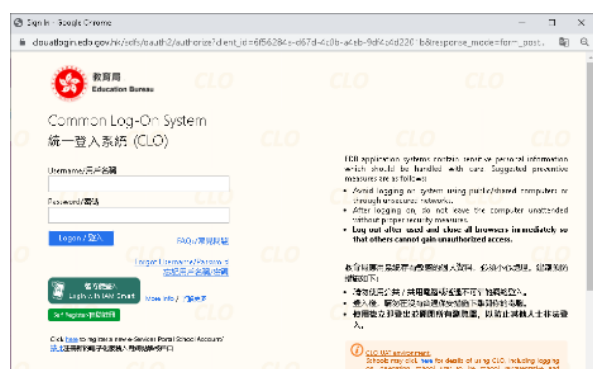
4.6.4 Filling in FI Questionnaire

When a school has undergone Focus Inspection, the principal and teachers are invited to fill in the FI Questionnaire.

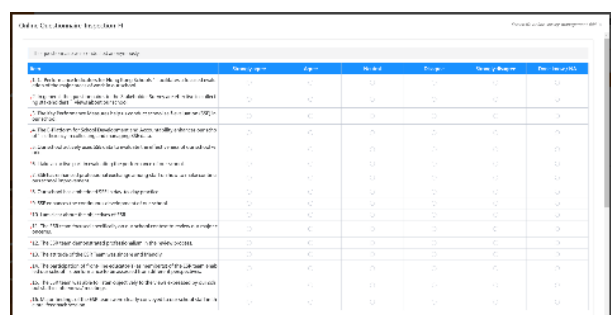
- 1) Click “Survey Management” and then click “Fill In Survey”.
- 2) Click “View” next to the target survey at Pending survey.



- 3) CLO authentication is required for filling in the survey. The following screen will be shown for the first time logging in. This step will be skipped afterward.



- 4) Fill in the survey and click “Submit”.



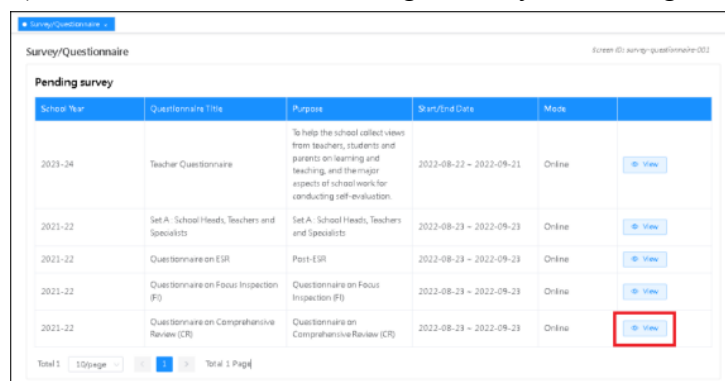
Note:

If you cannot load the questionnaire or cannot submit the questionnaire, please contact your System Administrator to check the Internet connection of the ESDA server.

4.6.5 Filling in CR Questionnaire

When a school has undergone a Comprehensive Review, the principal and teachers are invited to fill in the CR Questionnaire.

- 1) Click “Survey Management” and then click “Fill In Survey”.
- 2) Click “View” next to the target survey at Pending survey.



- 3) CLO authentication is required for filling in the survey. The following screen will be shown for the first time logging in. This step will be skipped afterward.



- 4) Fill in the survey and click “Submit”.



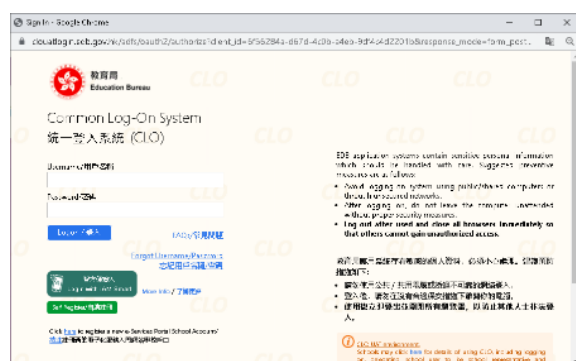
4.6.6 Filling in SDA Questionnaire

When a school has undergone External School Review, the principal and teachers are invited to fill in the SDA Questionnaire.

- 1) Click “Survey Management” and then click “Fill In Survey”.
- 2) Click “View” next to the target survey at Pending survey.

School Year	Questionnaire Title	Purpose	Start/End Date	Mode	
2023-24	Teacher Questionnaire	To help the school collect views from teachers, students and parents on learning and teaching, and the major aspects of school work for conducting self-evaluation.	2022-08-22 ~ 2022-09-21	Online	View
2021-22	Set A: School Heads, Teachers and Specialists	Set A: School Heads, Teachers and Specialists	2022-08-23 ~ 2022-09-23	Online	View
2021-22	Questionnaire on ESR	Post-ESR	2022-08-23 ~ 2022-09-23	Online	View

- 3) CLO authentication is required for filling in the survey. The following screen will be shown for the first time logging in. This step will be skipped afterward.



- 4) Fill in the survey and click “Submit”.

Note:

If you cannot load the questionnaire or cannot submit the questionnaire, please contact your System Administrator to check the Internet connection of the ESDA server.

4.6.7 Filling in School-based Survey

- 1) Click “Survey Management” and then click “Fill In Survey”.
- 2) Click “Start” next to the target survey at the list of Pending survey.

● Fill In Survey ×

Survey/Questionnaire

Screen ID: survey-questionnaire-001

Pending survey

School Year	Questionnaire Title	Purpose	Start/End Date	Mode	
2022-23	School: Homework, Co-curricular Activities		2022-10-27 ~ 2022-11-26	Offline	
2022-23	My views on school climate20221104		2022-11-04 ~ 2022-12-04	Online	Start

- 3) Fill in the survey and click “Submit”.

Questionnaire Title: My views on school climate20221104

Screen ID: survey-questionnaire-005 ×

*1.Rank

School Head	PGM/SEO/PAM/SPSM	SGM/EO	GM/AEO	PSM	APSM
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SAM/AM	CM	Specialist			
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>			

2.No browsing because: (choose one or more)

☐ No browsing because: (choose one or more)

☐ School does not have a website
 ☐ Don't know how to use related information technology (eg browser)
 ☐ don't know if the school has a website
 ☐ No time
 ☐ No need

☐ Browsed

☐ School have a website
 ☐ Know how to use related information technology (eg browser)

Cancel

Submit

4.6.8 Filling in Offline Survey

ESDA allows Stakeholder Survey, APASO and School-based questionnaires to be done via “offline” mode, i.e. respondents will answer the questionnaire in paper and pen. The Survey Administrator will enter the responses into the system manually. For details, please read Section 4.4.

Chapter 5 Data Input

5.1 About Data Input

System Operator can choose to input the data of these KPM items directly through the web interface. The system can validate the data types and the ranges of the values on entry. In addition, the valid range of data is shown next to each field to remind the Operator of the valid range of data. The Operator can save the data of a specific KPM item as “Draft” if the data are not finalised. Data marked as “Draft” will not be extracted in the Data Submission module.

Before You Begin

To access this functional module, your account should possess a “Data Input” privilege. If you cannot access the “Data Input”, please consult your System Administrator to acquire the privilege.

Understanding KPM

KPM is a tool developed by the EDB under the “School Development and Accountability” framework. It is a school data system built on the “Performance Indicators” framework, providing objective and quantitative data to supplement the performance indicators, which are mainly qualitatively orientated. For details of KPM, please refer to the KPM website (<https://www.edb.gov.hk/en/sch-admin/sch-quality-assurance/performance-indicators/kpm/index.html>).

5.1.1 Data Operator Guide

Survey Administrator may coordinate with Data Operator to perform data input on various ESDA modules. The following sections briefly describe the major tasks that a Data Operator should perform in various situations.

Contact System Administrator to ensure that the following items are ready.

- 1) You should possess “Data Input” privilege for viewing the school year from the “Input KPM Data” and input the year for “Current School Development Cycle”. Please ensure that the school years for inputting data are enabled.
- 2) Export a csv file from APASO application (for importing offline APASO data).
- 3) Results of Stakeholder Survey of previous school years.
- 4) Results of “Attitudes to School” in APASO of previous school years.

System Overview **Input KPM Data** Screen ID: input-school-perf-meas-data-001

Input KPM Data(KPM2015)

KPM Items for Schools Current School Development Cycle : 2019-20 2021-22 **Edit**

KPM Items	Last Update	Status
Stakeholder Survey		
1. Teacher Questionnaire	2022-02-25 00:00	Partially Completed
2. Student Questionnaire	2022-02-27 00:00	Partially Completed
3. Parent Questionnaire	2022-02-27 00:00	Partially Completed

5.2 Input KPM Item Data

- 1) Mouse over “Data Input” and then click “Input KPM Data”.
- 2) Click “Edit” next to the “Current School Development Cycle”.
- 3) Input the School Year and click “Save”.

System Overview **Input KPM Data** Screen ID: input-school-perf-meas-data-001

Input KPM Data(KPM2015)

KPM Items for Schools Current School Development Cycle : 2019-20 2021-22 **Save** **Cancel**

KPM Items	Last Update	Status
-----------	-------------	--------

- 4) Click the links for the KPM items.
- 5) Enter the values. If some data are unavailable at this moment, Data Operator can tick “No data at present” and then click “Save”.

Note:

Data Operator may click the “View KPM Data” button to view the current KPM value stored.

Input KPM Data(KPM2015) Screen ID: data-import-002

Notes:
 (i) For details, please refer to the latest Education Bureau Circular on continuing professional development of teachers on catering for students with special educational needs.
 (ii) This KPM item may be used for compilation of the KPM Reference Data in future.

	Year				
	2019-20	2020-21	2021-22		
Accumulated value as at 30/01/2021					
Percentage of teachers who have completed the Basic Course	18.50	16.90	14.80	%	(From 0.00 To 100.00)
Number of teachers who have completed the Advanced Course	6	5	5		(From 0 To 500)
Number of teachers who have completed the Thematic Courses	6	6	4		(From 0 To 500)

☐ No data at present

Note:

- (1) You should click “Hold” if the data of a KPM item are not finalised.
- (2) You should enter the value within the “Acceptance Range”.
- (3) You can choose other KPM items from the pull-down menu.
- (4) Data marked as “Draft” will not be exported to the EDB in the “Data Submission” module. Data marked as “Partially Completed” or “Completed” will be exported to the EDB.

5.3 Input Physical Development Data

In ESDA v5.0.x, students’ height and weight information are added to student records. The Students’ Physical Development data can be calculated from the student account records.

5.3.1 Import Data

- 1) Mouse over “Data Input” and then click “Input Physical Development Data”.
- 2) Click “Download Template File” to download the input file template.

System Overview Screen ID: input-student-physical-dev-data-001

Input Physical Development Data

Upload Excel File

An Excel file contains a maximum of 2000 records

Manual Update

Class Level
 Class
 Gender

User Name
 Status

3) Click “Choose File” to choose file to be imported, and click “Upload Excel File”.

Input Physical Development Data

Upload Excel File

Choose File

Upload Excel File

Download Template File

An Excel file contains a maximum of 2000 records

5.3.2 Update Data

- 1) Mouse over “Data Input” and then click “Input Physical Development Data”.
- 2) Input searching criteria, such as “Class Level”, “Class”, “Gender”, “User Name” or “Status” and click “Search”.
- 3) Click “Edit”.

Manual Update

Class Level

Select

Class

Select

Gender

Select

User Name

User Name

Status

Normal

Search

Export To KPM Item (KPM22)

Name (English)	Name (Chinese)	Gender	Height/CM	Weight/KG	BMI	Operation
[1A01] CHAN TSZ	[1A01] 陳子	Male				Edit
[1A02] CHAN YAN	[1A02] 陳昕	Female				Edit

4) Input values and click “Save”.

Name (English)	Name (Chinese)	Gender	Height/CM	Weight/KG	BMI	Operation
[1A01] CHAN TSZ	[1A01] 陳子	Male	<div> <div>–</div> <div>0.00</div> <div>+</div> </div>	<div> <div>–</div> <div>0.00</div> <div>+</div> </div>		<div>Cancel</div> <div>Save</div>

5.3.3 Export Student Physical Development Data to KPM Item

- 1) Mouse over “Data Input” and then click “Input Physical Development Data”.
- 2) Click “Export to KPM Item (KPM22)” to export data.

System Overview
Input Physical Development Data x

Manual Update

Class Level
Select

Class
Select

Gender
Select

User Name
User Name

Status
Normal

Q Search

Export To KPM Item (KPM22)

- 3) Click “Cancel” after completion.

Data exported to KPM	
...	
S2(M)	0%
S2(F)	0%
S3	
S3(M)	0%
S3(F)	0%
S4	
S4(M)	4%
S4(F)	0%
S5	
S5(M)	11%
S5(F)	9%
S6	
S6(M)	62%
S6(F)	78%

Cancel

Chapter 6 Report Management

6.1 About Report Management

This functional module is mainly designed for data analysis as well as the output of the results. The display is in two formats (table and chart). Different forms of displays will be shown according to the types of surveys. The system provides reports for Stakeholder Survey, KPM, APASO and School-based Survey.

6.1.1 Before You Begin

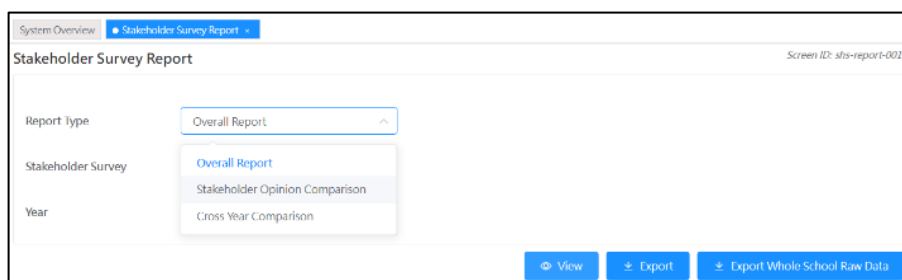
To access this functional module, your account should possess a “Report Management” privilege. If you cannot access the “Report Management”, please consult your System Administrator to acquire the privilege.

6.1.2 Best Practices

To generate complete and meaningful reports, you should ensure the completeness and correctness of data collection in related sections. For KPM item, you can check the correctness of the KPM item in “Data Input” module. For Stakeholder Survey and APASO, you should ensure all responses from respondents are stored in the system.

6.2 Stakeholder Survey Report

- 1) Mouse over “Report Management”.
- 2) Click “Stakeholder Survey Report”.
- 3) Select “Report Type”, including “Overall Report”, “Stakeholder Opinion Comparison” and “Cross Year Comparison”.



- 4) To view “Overall Report”
 - Select “Overall Report” in “Report Type”.
 - Select “Stakeholder Survey” and “School Year”.
 - Click “View”.

The screenshot shows the 'Stakeholder Survey Report' form. At the top right, it says 'Screen ID: shs-report-001'. The form has three dropdown menus: 'Report Type' with 'Overall Report' selected, 'Stakeholder Survey' with 'Teacher Questionnaire' selected, and 'Year' with '2021-22' selected. At the bottom right, there are three buttons: 'View', 'Export', and 'Export Whole School Raw Data'.

5) To view “Stakeholder Opinion Comparison” Report

- Select “Stakeholder Opinion Comparison” in “Report Type”.
- Select “School Year”.
- Click “View”.

The screenshot shows the 'Stakeholder Survey Report' form. At the top right, it says 'Screen ID: shs-report-001'. The form has three dropdown menus: 'Report Type' with 'Stakeholder Opinion Comparison' selected, 'Stakeholder Survey' with 'Teacher Questionnaire' selected, and 'Year' with '2021-22' selected. At the bottom right, there are two buttons: 'View' and 'Export'.

6) To view “Cross Year Comparison” Report

- Select “Cross Year Comparison” in “Report Type”.
- Select Stakeholder Survey and “From” and “To” of the school year.
- Click “View”.

The screenshot shows the 'Stakeholder Survey Report' form. At the top right, it says 'Screen ID: shs-report-001'. Below the title, it says 'Please select the school year periods (maximum three years) to generate a cross-year stakeholder comparison report:'. The form has three dropdown menus: 'Report Type' with 'Cross Year Comparison' selected, 'Stakeholder Survey' with 'Teacher Questionnaire' selected, and 'Year' with 'From : Select' and 'to : 2021-22' selected. At the bottom right, there are two buttons: 'View' and 'Export'.

7) To export the reports, click “Export”.

6.3 KPM Item Report

- 1) Mouse over “Report Management”.
- 2) Click “KPM Item Report”.
- 3) Select school years.
- 4) Click “Export All”.
- 5) Click “Open” for the Excel file.
- 6) Click “Run Macro” upon opening the Excel file.

System Overview • KPM Item Report

KPM Item Report Screen ID: kpm-report-001

Please select the following school year option (maximum 3 years) to generate the KPM Item Report:

Refer School Year

Optional School Year

Optional School Year

[Export All](#)

Note:

The security level in the Excel program must be set to “middle” or “low” in order to run the macro above. In general, select “Tools” > “Macro” > “Security” in the Excel function bar and change the security level to Middle.

6.4 Assessment Program for Affective and Social Outcomes (2nd version) (APASO-II) Report

In addition to the normal Current Report, users may choose Cross Year Report, Same Student Group Comparison Report or Subscales Comparison Report.

Note:

After clicking the APASO-II report link, the system will prompt four additional selection links: (1) Current Year Report, (2) Cross Year Report, (3) Same Student Group Comparison Report, and (4) Subscales Comparison Report.

6.4.1 APASO-II report - Current Year Report

- 1) Mouse over “Report Management”.
- 2) Click APASO-II Report.
- 3) Click “Current Year Report”.
- 4) Select the appropriate Year, Survey Title and Time Frame.
- 5) Select the appropriate Report Type and Data Set.

The screenshot shows the 'APASO Report' configuration interface. At the top, there's a 'System Overview' tab and a 'APASO Report' tab. The main area contains several dropdown menus and radio buttons for configuration. The 'Report Type' is set to 'Current Year Report'. The 'Year' is set to '2020-21'. The 'Survey Type' is set to 'Pre-defined Survey'. The 'Survey Title' is set to 'Stress Management'. The 'Time Frame and Respondents' section shows a date range from '2021-03-01' to '2021-04-25' and a selection of 'Student\$1 + \$2 + \$3 + \$4 + \$5 (Random)'. The 'Report Type' (lower) is set to 'Mean plot'. The 'Data Set' is set to 'Raw Score'. The 'Student Group' is set to 'Junior'.

- 6) Select corresponding sub-items of the respondents.
- 7) Click “View Respondent Group Report” and open the Excel file.

The screenshot shows the 'Respondent Group' selection interface. It includes radio buttons for 'Data Set' (Raw Score, Rash Score) and 'Student Group' (Junior, Senior). Under 'Respondent Group', there are checkboxes for 'ALL', 'Form', 'S1', 'S2', 'S3', 'Class', '1A', '1B', '1C', '1D', '2A', '2B', '2C', '2D', '3A', '3B', '3C', '3D', 'Gender', 'Male', and 'Female'. The 'Class' and 'Male' options are selected. At the bottom, there are three buttons: 'View Respondent Group Report', 'Export Whole School Raw Data', and 'Export'.

Note:

- (1) Some options in “Respondent Group” will be dimmed if they are not applicable to the selected report type.
- (2) The system will prompt a message if the number of options in the generated report exceed 100, please reduce the number of options and re-run the report.
- (3) To export raw data for this survey, click “Export Whole School Raw Data”.

6.4.2 APASO-II report - Cross Year Report

- 1) Mouse over “Report Management”.
- 2) Click “APASO-II Report”.
- 3) Click “Cross Year Report”.
- 4) Select the appropriate Survey Title.
- 5) Select the appropriate Time Frame.
- 6) Click “View Respondent Group Report” and open the Excel file.

The screenshot shows the 'APASO-II Report' interface with 'Cross Year Report' selected. It features several dropdown menus for 'Year' (set to 2021-22), 'Survey Type' (Pre-defined Survey), and 'Survey Title' (Stress Management). Below these, there are three time frame options: 'Required' (2022-01-15 to 2022-02-25), 'Optional' (2021-03-01 to 2021-04-29), and 'No Data' (No Data). Each time frame has a corresponding 'Respondents' count and a formula. At the bottom, there is a 'Respondent Group' section with 'Junior' selected and 'Senior' as an option. Two buttons at the bottom right are 'View Respondent Group Report' and 'Export'.

Note:

The system will only generate a report if there are data of two or more time frames.

6.4.3 APASO-II report – Same Student Group Comparison Report

- 1) Mouse over “Report Management”.
- 2) Click “APASO-II Report”.
- 3) Click “Same Student Group Comparison Report”.

The screenshot shows the 'APASO-II Report' interface with 'Same Student Group Comparison Report' selected. It features dropdown menus for 'Year' (2019-20 and 2021-22), 'Survey Type' (Pre-defined Survey), and 'Survey Title' (Self-Concept). Below these, there are two time frame options: 'Period(A) Questionnaire' (2021-07-26 to 2022-08-28) and 'Period(B) Questionnaire' (2021-07-26 to 2022-08-28). Each time frame has a corresponding 'Respondents' count and a formula. At the bottom, there is a 'Respondent Group' section with 'Junior' selected and 'Senior' as an option. Two buttons at the bottom right are 'View Respondent Group Report' and 'Export Whole School Data'.

- 4) Select the appropriate Year.
- 5) Select the appropriate Survey Title.
- 6) The system will search and prompt the published surveys.
- 7) Select the appropriate Period.
- 8) Click “View Respondent Group Report” and open the Excel file.

6.4.4 APASO-II report – Subscales Comparison Report

- 1) Mouse over “Report Management”.
- 2) Click “APASO-II Report”.
- 3) Click “Subscales Comparison Report”.

System Overview | APASO Report

APASO Report Screen ID: apaso-report-001

Report Type: Subscales Comparison

Next

Aspect included in the survey	Sub Scale	Item Count
<input type="checkbox"/> Self-Concept	<input type="checkbox"/> SEMO - Emotional Stability	8
	<input type="checkbox"/> SGAL - General	5
	<input type="checkbox"/> SHON - Honesty / Trustworthiness	9
	<input type="checkbox"/> SMAT - Mathematics	7
	<input type="checkbox"/> SPAP - Parent Relationships	7
	<input type="checkbox"/> SPHY - Physical Appearance	7
	<input type="checkbox"/> SVER - Verbal	5
<input checked="" type="checkbox"/> Health & Well Being	<input checked="" type="checkbox"/> STES - Test Anxiety	10

- 4) Select the appropriate subscales.
- 5) Click “Next”.
- 6) Select the appropriate Time Frame.

System Overview | APASO Report

APASO Report Screen ID: apaso-report-001

Report Type: Subscales Comparison

Choose time periods for comparison (up to three time periods):

Next Back

Time Frame and Respondents	Sub Scale	Item Count
2015-16: <input checked="" type="checkbox"/> 2016-01-28 ~ 2016-02-10	StudentS1 + S2 + S3 + S4 + S5[Random]	Health & Well Being
2016-17: <input checked="" type="checkbox"/> 2017-03-22 ~ 2017-04-22	StudentS1 + S2 + S3 + S4 + S5[Random]	Health & Well Being
2021-22: <input type="checkbox"/> 2022-07-29 ~ 2022-08-28	StudentS2[All]	Health & Well Being

- 7) Click “View the Selected Group Comparison Report”.

System Overview | APASO Report

APASO Report Screen ID: apaso-report-001

Report Type: Subscales Comparison

Back

Time Frame and Respondents	Sub Scale	Item Count
Time Frame and Respondents(2015-16): 2016-01-28 ~ 2016-02-10	StudentS1+S2+S3+S4+S5[Random]	88.19% [112/127]
Time Frame and Respondents(2016-17): 2017-03-22 ~ 2017-04-22	StudentS1+S2+S3+S4+S5[Random]	95.15% [98/103]

View Respondent Group Report

6.5 Assessment Program for Affective and Social Outcomes (3rd version) (APASO-III) Report

In addition to the Year Report, users may choose Cross Year Report, Same Student Group Comparison Report, Comparison Report, Socioeconomic Status Report or Gender Comparison Report.

Note:

After clicking the APASO-III report link, the system will show six report types for selection: (1) Year Report, (2) Cross Year Report, (3) Same Student Group Comparison Report, (4) Comparison Report, (5) Socioeconomic Status Report and (6) Gender Comparison Report.

6.5.1 APASO-III report - Year Report

- 1) Mouse over “Report Management”.
- 2) Click APASO-III Report.
- 3) Click “Year Report”.
- 4) Select the appropriate Year, Survey Title and Time Frame.
- 5) Select the appropriate Report Type and Data Set. Select “Subscale Report” or “Item Report” for Report Type. Select “Q-Score” or “P-Score” for Data Set.

The screenshot shows the 'APASO-III Report' configuration window. It includes a 'Year' dropdown set to '2022-23', a 'Survey Title' dropdown set to 'Student: Physical Health', and a 'Time Frame and Respondents' section with two radio button options: '2022-08-29 ~ 2022-09-28 [All]' (selected) and '2022-09-23 ~ 2022-10-23 S1+S2[All]'. Below this is a 'Report Type' section with 'Subscale Report' (selected) and 'Item Report' (unselected). At the bottom is a 'Data Set' section with 'Q-Score' (selected) and 'P-Score' (unselected).

- 6) Select corresponding sub-items of the respondents.
- 7) Click “View”.

The screenshot shows the 'Respondent Group' selection interface. It has a tree view with 'All' selected under 'Respondent Group'. Under 'All', 'Junior' and 'Senior' are listed. Under 'Junior', 'S1', 'S2', and 'S3' are listed. Under 'S1', 'SA', 'SB', and 'SC' are listed. Under 'Gender', 'Male' and 'Female' are listed. At the bottom, there are two buttons: 'Q View' and 'Export Whole School Raw Data'.

Note:

- (1) System will only generate report with more than 10 respondents.
- (2) Some options in “Respondent Group” will be dimmed if they are not applicable to the selected report type.
- (3) The system will prompt a message if the number of options in the generated report exceed 100, please reduce the number of options and re-run the report.
- (4) To export raw data for this survey, click “Export Whole School Raw Data”.

6.5.2 APASO-III report - Cross Year Report

- 1) Mouse over “Report Management”.
- 2) Click “APASO-III Report”.
- 3) Click “Cross Year Report”.

The screenshot shows the 'APASO III Report' interface. At the top, there are tabs for 'System Overview' and 'APASO III Report'. The main title is 'APASO III Report' with a screen ID of 'apaso-report-010'. Below the title, there are four configuration sections: 'Report Type' set to 'Cross Year Report', 'Year' set to '2022-23', 'Survey Title' set to 'Student: Physical Health', and 'Time Frame and Respondents' with two radio button options: '2022-08-29 ~ 2022-09-28 [All]' (selected) and '2022-09-23 ~ 2022-10-23 S1+S2[All]'.

- 4) Select the appropriate Year, Survey Title, Time Frame and Respondents.
- 5) Select the appropriate subcales.
- 6) Select the Respondent Group and click “Next”.
- 7) Select the Year to compare, Survey Title, Time Frame and Respondents.
- 8) Select the Data Set and click “View”.

Note:

The system will only generate a report if there are data of two or more time frames.

6.5.3 APASO-III report – Same Student Group Comparison Report

- 1) Mouse over “Report Management”.
- 2) Click “APASO-III Report”.
- 3) Click “Same Student Group Comparison Report”. This report can only compare and trace the data for two consecutive years.

The screenshot shows the 'APASO III Report' interface. At the top, there are tabs for 'System Overview' and 'APASO III Report'. Below the tabs, the 'Report Type' is set to 'Same Student Group Comparison Report'. The 'Year' is set to '2022-23'. The 'Survey Title' is set to 'Student: Psychological Health'. Under 'Time Frame and Respondents', two options are shown: '2022-08-29 ~ 2022-09-28 [All]' (selected) and '2022-09-23 ~ 2022-10-23 S1+S2[All]'.

- 4) Select the appropriate Year, Survey Title, Time Frame and Respondents.
- 5) Select the appropriate Subscale.
- 6) Select the Respondent Group and click “Next”
- 7) Click “View”.

This screenshot shows the next step in the APASO III Report selection process. The 'Survey Title' is 'Student: Psychological Health' and the time frame is '2022-08-29 ~ 2022-09-28 [All]' with a response rate of '4.53% [30/662]'. Under 'Subscale Selected', two options are available: 'PSYSOM - Affect (No Psychosomatic Symptoms)' and 'ANXTEST - Affect (No Academic Anxiety)'. The 'Year2' is set to '2023-24'. The 'Survey Title' remains 'Student: Psychological Health'. Under 'Time Frame and Respondents', '2022-11-04 ~ 2022-12-04 S1+S2[All]' is selected with a response rate of '11.57% [25/216]'. The 'Data Set' is set to 'Q-Score'. At the bottom right, there are three buttons: 'Q View', 'Export Whole School Raw Data', and 'Back'.

Note:

To export raw data for this survey, click “Export Whole School Raw Data”.

6.5.4 APASO-III report – Comparison Report

- 1) Mouse over “Report Management”.
- 2) Click “APASO-III Report”.
- 3) Click “Comparison Report”.
- 4) Select the appropriate Year, Survey Title, Time Frame and Respondents.

System Overview
APASO III Report

APASO III Report
Screen ID: apaso-report-010

Report Type
Comparison Report

Year
2022-23

Survey Title
Student: Psychological Health

Time Frame and Respondents
2022-08-29 ~ 2022-09-28 [All]
2022-09-23 ~ 2022-10-23 S1+S2[All]

Subscale	Scale	Subscale	No. of items
		<input type="checkbox"/> Affect (Positive Affect)	4
		<input type="checkbox"/> Affect (No Negative Affect)	4
		<input type="checkbox"/> Affect (No Fear of Failure)	3

- 5) Select the appropriate Subscale, click “Next”. At most six subscales can be selected.
- 6) Select the appropriate “Time Frame and Respondents”.
- 7) Select the appropriate “Respondent Group”, the tentative group would be shown under “Selectable Group”, click “Select” to move to “Selected Group” or click “Delete” to remove inappropriate group(s).

Survey

Year
2022-23

Survey Title
Student: Psychological Health

Time Frame and Respondents
2022-08-29 ~ 2022-09-28 [All] 4.53% [30/662]
2022-09-23 ~ 2022-10-23 S1+S2[All] 68.14% [154/226]

Respondent Group
☐ ALL
☒ Junior
☒ Senior
☐ Form
☐ S1
☐ S2
☐ S4
☐ Class
☐ 1A

Selectable Group
Year: 2022-23 Survey: Student: Psychological Health Group: Senior+ Junior
Select

Selected Group
Group1: Year: 2022-23 Survey: Student: Psychological Health Group: Senior
Delete

- 8) Click “Next” after selecting the required groups.

Selected Group

Group1: Year: 2022-23 Survey: Affective Development (Applicable to KPM17) Group: S1	Delete
Group2: Year: 2022-23 Survey: Affective Development (Applicable to KPM17) Group: 2A	Delete
Group3: Year: 2022-23 Survey: Affective Development (Applicable to KPM17) Group: 2B	Delete
Group4: Year: 2022-23 Survey: Affective Development (Applicable to KPM17) Group: (Male)	Delete
Group5: Year: 2022-23 Survey: Affective Development (Applicable to KPM17) Group: (Female)	Delete

Next

Back

9) Select item for x-axis and Data set, click “View”. You may select “Subscale” or “User Group” as x-axis as appropriate.

Report Type
Comparison Report

Subscale Selected

SWBP - Affect (Positive Affect)	SWBN - Affect (No Negative Affect)	GFOFAIL - Affect (No Fear of Failure)
GANXDEP - Affect (No Anxiety, Depressive Symptoms)	ANXTEST - Affect (No Academic Anxiety)	PSYSOM - Affect (No Psychosomatic Symptoms)

Group

Group1: Year: 2022-23 Survey: Student: Psychological Health Time Frame and Respondents: 2022-08-29 ~ 2022-09-28 [All] 4.53% [30/662]
Group: Senior

X Axis ☒ Subscale ☐ User Group

Data Set ☒ Q-Score ☐ P-Score

[View](#) [Back](#)

6.5.5 APASO-III report – Gender Comparison Report

- 1) Mouse over “Report Management”.
- 2) Click “APASO-III Report”.
- 3) Click “Gender Comparison Report”.
- 4) Select the appropriate Year, Survey Title, Time Frame and Respondents.
- 5) Select the appropriate Data Set and Subscale. At most six subscales can be selected.

APASO III Report
Screen ID: apaso-report-010

Report Type
Gender Comparison Report

Year
2022-23

Survey Title
Student: Psychological Health

Time Frame and Respondents
☒ 2022-08-29 ~ 2022-09-28 [All] ☐ 2022-09-23 ~ 2022-10-23 S1+S2[All]

Data Set
☒ Q-Score ☐ P-Score

Subscale	Scale	Subscale	No. of items
		<input checked="" type="checkbox"/> Affect (Positive Affect)	4
		<input checked="" type="checkbox"/> Affect (No Negative Affect)	4
		<input checked="" type="checkbox"/> Affect (No Fear of Failure)	3
		<input checked="" type="checkbox"/> Affect (No Anxiety, Depressive Symptoms)	4

6) Select the appropriate Respondent Group and click “View”.

Respondent Group ☐ ALL

☐ Junior ☐ Senior

☒ Form

☒ S1 ☐ S2 ☐ S4

☐ Class

☐ 1A

☐ 2A

☐ 4A

Custom Groups

[View](#)

6.5.6 APASO-III report – Socioeconomic Status Report

- 1) Mouse over “Report Management”.
- 2) Click “APASO-III Report”.
- 3) Click “Socioeconomic Status Report”.
- 4) Select the appropriate Year, Survey Title, Time Frame and Respondents.
- 5) Select the appropriate Data Set and Subscale. At most six subscales can be selected.

System Overview [APASO III Report](#)

APASO III Report Screen ID: apaso-report-010

Report Type: Socioeconomic Status Report

Year: 2022-23

Survey Title: Student: Psychological Health

Time Frame and Respondents: ☒ 2022-08-29 ~ 2022-09-28 [All] ☐ 2022-09-23 ~ 2022-10-23 S1+S2[All]

Data Set: ☒ Q-Score ☐ P-Score

Subscale	Scale	Subscale	No. of Items
<input checked="" type="checkbox"/>		Affect (Positive Affect)	4
<input checked="" type="checkbox"/>		Affect (No Negative Affect)	4

6) Select the appropriate Respondent Group and click “View”.

Respondent Group
☐ ALL
☒ Junior
☐ Senior

☐ Form

☐ S1
☐ S2
☐ S4

☐ Class

☐ 1A

☐ 2A

☐ 4A

Custom Groups

View

Note:

To generate the Socioeconomic Status Report, all items in “Family: Socioeconomic Status” subscale must be answered.

6.6 School-based Survey Report

- 1) Mouse over “Report Management” and click “School-based Survey Report”.
- 2) Input searching criteria, such as “Optional School Year” and “Mode”, then click “Search”.
- 3) Click “View” or “Export” next to the School-based Survey.

System Overview
School-based Survey Report

School-based Survey Report

Screen ID: sep-report-001

Optional School Year
2022-23
Mode
Select
Search

Survey Title	Start/End Date	Target Users	Mode	
Self-defined QA 2022-23	2022-11-06 ~ 2022-12-06	Student[Random]	Online&Offline	View Export
My views on school climate20221104	2022-11-04 ~ 2022-12-04	Student[All]	Online&Offline	View Export
My views on school climate	2022-11-04 ~ 2022-12-04	Student[All]	Online&Offline	View Export
My opinion to teacher professional development	2022-11-03 ~ 2022-12-03	Student[All]	Online&Offline	View Export

Chapter 7 Data Submission

7.1 About Data Submission

This module provides functions for extracting data from Stakeholder Survey and KPM Items. It shows all school years which are enabled in the “School Year Setting” and the status of each item of these school years. An operator can export data from any of these years into a package. The package should include KPM report and SHS report.

7.1.1 Before You Begin

To access this functional module, your account should possess a “Data Submission” privilege. Please consult your System Administrator to acquire the privilege if you cannot access the “Preparation for Submission”.

7.1.2 Best Practices

KPM item with the status “Draft” will not be exported to the data package. You should ensure that the status of finalised KPM Items is changed to “Completed”, “Partially Completed” or “No data at present”. For example, there are many sub-items in KPM07. If you input and save some of the KLA lesson time percentages only, the status of KPM07 becomes “Partially Completed”. The status will be changed to “Completed” until you have inputted (and validated) all these items.

7.2 Submitting Data File to EDB

The Data Submission module can pack data into a single file to facilitate data submission to the EDB. Survey Administrator may follow the steps below to prepare an ESDA data pack:

- 1) Mouse over “Data Submission” and then click “Preparation for Submission”.
- 2) Check the checkbox(es) in the school year panel to select the data set you will submit to the EDB.
Only data marked as “Completed” or “Partially Completed” will be exported to the data package.
- 3) Click “CLO Authorisation”.

System Overview **Preparation for Submission** Screen ID: data-submission-001

Preparation for Submission

Select the year(s) of data to be submitted

		School Year					
		<input type="checkbox"/> 2015-16	<input type="checkbox"/> 2016-17	<input type="checkbox"/> 2017-18	<input type="checkbox"/> 2018-19	<input type="checkbox"/> 2019-20	<input type="checkbox"/> 2020-21
		Status					
1.	Attitude towards school	Not Start	Not Start	Not Start	Not Start	Not Start	Not Start
2.	Student Questionnaire	Partially Completed	Partially Completed	Partially Completed	Partially Completed	Partially Completed	Partially Completed
3.	Parent Questionnaire	Partially Completed	Partially Completed	Partially Completed	Partially Completed	Partially Completed	Partially Completed
4.	Teacher Questionnaire	Partially Completed	Partially Completed	Completed	Partially Completed	Partially Completed	Completed
5.	Key Performance Measures (KPM)	Partially Completed	Partially Completed	Partially Completed	Partially Completed	Partially Completed	Partially Completed
6.	KPM Detail	Detail	Detail	Detail	Detail	Detail	Detail
7.	Last submission Date	--	--	--	--	--	--

[CLO Authorize](#)
[Direct Send to EDB](#)
[Send to EDB via other means](#)

4) Enter Username and Password, click “Logon”.

Sign In - Google Chrome

clouatlogin.edb.gov.hk/adfs/oauth2/authorize?client_id=6f56284a-d67d-4c0b-a4eb-9df4c4d2201b&response_mode=form_post...


教育局
Education Bureau

Common Log-On System
統一登入系統 (CLO)

Username/用戶名稱

Password/密碼

[Logon / 登入](#) [FAQs/常見問題](#)

[Forgot Username/Password](#)
[忘記用戶名稱/密碼](#)

[Smart Login with IAM Smart](#) [More Info / 了解更多](#)

[Self Register/自助註冊](#)

Click [here](#) to register a new e-Services Portal School Account/
[按此註冊新的電子化服務入門網校學校戶口](#)

EDB application systems contain sensitive personal information which should be handled with care. Suggested preventive measures are as follows:

- Avoid logging on system using public/shared computers or through unsecured networks.
- After logging on, do not leave the computer unattended without proper security measures.
- Log out after used and close all browsers immediately so that others cannot gain unauthorized access.**

教育局應用系統存有敏感的個人資料，必須小心處理。建議預防措施如下：

- 請勿使用公共 / 共用電腦或透過不安全的網絡登入。
- 登入後，請勿在沒有合適保安措施下離開你的電腦。
- 使用後立即登出並關閉所有瀏覽器，以防止其他人士非法登入。**

CLO UAT environment.
Schools may click [here](#) for details of using CLO, including logging on, delegating school user to be school representative and...

5) If you do not have a CLO account, you may retry after CLO account registration.

6) “Login is successful” will be prompted if CLO login is successful. Close the windows to continue the data submission.

ESDA https://10.15.146.114/uat/dmz/postSurvey?RC=MMZ... Not secure | <https://10.15.146.114/uat/dmz/postSurvey?RC...>

Login is successful, please close this page and return to ESDA

7) Click the school year for the data to be submitted and click “Direct Send to EDB”.

System Overview | Preparation for Submission | Screen ID: data-submission-03

Preparation for Submission

Select the year(s) of data to be submitted

		School Year					
		<input type="checkbox"/> 2015-16	<input type="checkbox"/> 2016-17	<input type="checkbox"/> 2017-18	<input type="checkbox"/> 2018-19	<input type="checkbox"/> 2019-20	<input checked="" type="checkbox"/> 2020-21
		Status					
1.	Attitude towards school	Not Start	Not Start	Not Start	Not Start	Not Start	Not Start
2.	Student Questionnaire	Partially Completed	Partially Completed	Partially Completed	Partially Completed	Partially Completed	Partially Completed
3.	Parent Questionnaire	Partially Completed	Partially Completed	Partially Completed	Partially Completed	Partially Completed	Partially Completed
4.	Teacher Questionnaire	Partially Completed	Partially Completed	Completed	Partially Completed	Partially Completed	Completed
5.	Key Performance Measures (KPM)	Partially Completed	Partially Completed	Partially Completed	Partially Completed	Partially Completed	Partially Completed
6.	KPM Detail	Detail	Detail	Detail	Detail	Detail	Detail
7.	Last submission Date	--	--	--	--	--	--

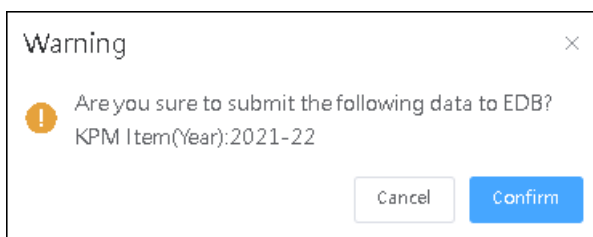
[CLO Authorize](#) [Direct Send to EDB](#) [Send to EDB via other means](#)

8) If you are planning to send a data pack to EDB by other means, such as sending a data pack by email, the steps are as follows:

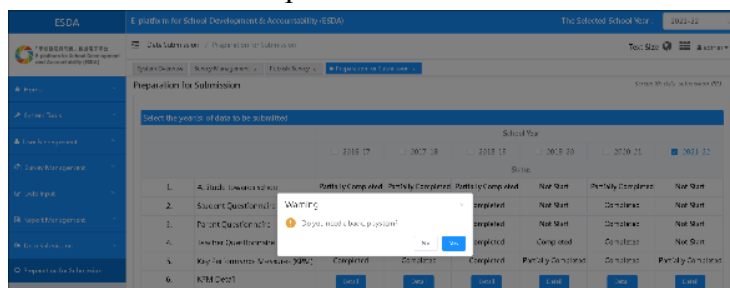
- (i) Click “Send to EDB via other means” and save a copy as a backup.



- (ii) Click “Confirm” to submit data.



- (iii) Click “Yes” to backup data.



Note:

The system will automatically run the KPM item checking to the selected year(s). If invalid KPM data are found, a warning message will be prompted. The Survey Administrator has to correct these values before you can continue.

7.3 Retrieving Data Submission Status

Whenever schools submit ESDA data to the EDB, the system will retrieve the confirmation status of the submitted data package through the version control module.

System Overview ● Preparation for Submission ▾		
⏏ CLO Authorisation	✉ Direct Send to EDB	⬇ Send to EDB via other means
Data Submission History		
Submit Date	Submit Year	Submit Status
2021-09-04 22:06:29	2019-20 , 2020-21	Submitted successfully
2020-07-17 16:03:20	2018-19 , 2019-20	Submitted successfully
2020-07-17 16:03:04	2018-19 , 2019-20	Submitted successfully

Chapter 8 School-based Survey Management

8.1 About School-based Survey Management

This module provides functions for "Manage School-based Survey" and "Manage School-based Survey Items".

8.1.1 Before You Begin

To access this functional module, your account should possess "School-based Survey Management" privilege. Please consult your System Administrator to acquire the privilege if you cannot access the "School-based Survey Management".

8.2 Manage School-based Survey

Survey Administrator can use "School-based Survey Management" to manage all school-based survey. To enter the "School-based Survey Management", mouse over the "School-based Survey Management" and click "Manage School-based Survey".

8.2.1 Create New Survey

- 1) Mouse over "School-based Survey Management" and then click "Manage School-based Survey".
- 2) Check whether the required survey exists in the system.
- 3) Click "Add" to add a new survey.
- 4) In "Add School-based Survey" page:
 - Input all the fields of survey information.
 - Click "Save" to save the survey setting

Screen ID: sep-survey-management-006

* Questionnaire Title (Chi)

* Questionnaire Title (Eng)

* Questionnaire Objective (Chi)

* Questionnaire Objective (Eng)

8.2.2 View Survey

- 1) Mouse over "School-based Survey Management" and then click "Manage School-based Survey".
- 2) Click "View" next to the survey.

Manage School-based Survey Screen ID: sep-survey-management-001

Survey Type: School-based survey

[Add](#)

Questionnaire Title	Questionnaire Objectives	Status	Imported Survey	Operation
My views on school climate	My views on school climate	Normal	N	View Edit Delete Edit Question Set Question Order Clone Survey
My views on teachers' professional development	professional development	Normal	N	View Edit Delete Edit Question Set Question Order Clone Survey

8.2.3 Edit Survey

- 1) Mouse over “School-based Survey Management” and then click “School-based Survey”.
- 2) Click “Edit” of the survey to modify the Title and Objective of the survey.

Manage School-based Survey Screen ID: sep-survey-management-001

Survey Type: School-based survey

[Add](#)

Questionnaire Title	Questionnaire Objectives	Status	Imported Survey	Operation
My views on school climate	My views on school climate	Normal	N	View Edit Delete Edit Question Set Question Order Clone Survey
My views on teachers' professional development	professional development	Normal	N	View Edit Delete Edit Question Set Question Order Clone Survey

- 3) Input the data to be modified and click “Save” to save the settings.

Edit SEP Survey Screen ID: sep-survey-management-007

* Questionnaire Title (Chi): 我對學校氣氛的觀感

* Questionnaire Title (Eng): My views on school climate

* Questionnaire Objective (Chi): 我對學校氣氛的觀感

* Questionnaire Objective (Eng): My views on school climate

[Cancel](#) [Save](#)

8.2.4 Delete Survey

- 1) Mouse over “School-based Survey Management” and then click “Manage School-based Survey”.
- 2) Click “Delete” next to the survey.

Manage School-based Survey Screen ID: sep-survey-management-001

Survey Type: School-based survey

[Add](#)

Questionnaire Title	Questionnaire Objectives	Status	Imported Survey	Operation
My views on school climate	My views on school climate	Normal	N	View Edit Delete Edit Question Set Question Order Clone Survey
My views on teachers' professional development	professional development	Normal	N	View Edit Delete Edit Question Set Question Order Clone Survey

8.2.5 Select Question

- 1) Mouse over “School-based Survey Management” and then click “Manage School-based Survey”.
- 2) Click “Select Question” of the survey to link the questions.

System Overview | Manage School-based Survey | Screen ID: sep-survey-management-001

Survey type: School-based survey | Questionnaire Title: Questionnaire Title | Search

Add

Questionnaire Title	Questionnaire Objectives	Imported Survey	Operation
IT Infrastructure and Resources	IT Infrastructure and Resources	N	View Edit Delete Select Question Set Question Order Clone Survey
My views on school climate	My views on school climate	N	View Edit Delete Select Question Set Question Order Clone Survey

- 3) Input the searching criteria, such as “Question Name” or “Question Type” and click “Search”.
- 4) Select the survey questions and click “Confirm” to save the question setting. (Please create new question at “Mange School-based Survey Item” if new question is required.

SEP Questionnaire-Edit-My views on school climate | Screen ID: sep-survey-management-005

Question Name: | Question Type: Select | Search

Question Name	Question Type
<input checked="" type="checkbox"/> > Do you agree with the following statements about IT teaching and application?	Parent Question
<input checked="" type="checkbox"/> No browsing because: (choose one or more)	Custom Multiple Choice(Group)
<input type="checkbox"/> Have you ever browsed the website of the school your child attends?	Text Input
<input type="checkbox"/> The school establishes different channels for the staff, students and parents to express their opinions.	Standard Single Choice 4
<input type="checkbox"/> The school actively reports its self-evaluation findings to the staff, students and parents.	Standard Single Choice 4
<input checked="" type="checkbox"/> The school systematically collects evaluation data, with a focus on students' whole-person development, for a holistic review of its work effectiveness.	Standard Single Choice 4
<input checked="" type="checkbox"/> The school effectively monitors the implementation of its work.	Standard Single Choice 4
<input checked="" type="checkbox"/> The school's decision-making process is transparent.	Standard Single Choice 5
<input checked="" type="checkbox"/> The school promotes collaboration among the staff to jointly implement school plans.	Standard Single Choice 5
<input checked="" type="checkbox"/> During a typical week, on how many days do you engage in the following activities?	Multiple Choice
<input checked="" type="checkbox"/> Further comments or suggestions on the arrangements of FI:	Text Input

Cancel Confirm

8.2.6 Set Question Order

- 1) Mouse over “School-based Survey Management” and then click “Manage School-based Survey”.
- 2) Click ”Set Question Order” next to the survey.

Manage School-based Survey | Screen ID: sep-survey-management-001

Survey type: School-based survey

Add

Questionnaire Title	Questionnaire Objectives	Status	Imported Survey	Operation
My views on school climate	My views on school climate	Normal	N	View Edit Delete Edit Question Set Question Order Clone Survey
My views on teachers' professional development	professional development	Normal	N	View Edit Delete Edit Question Set Question Order Clone Survey

3) Use the mouse to drag the question to the desired order.

4) Click “Confirm” to save the setting.

SEP Questionnaire-Set Question Order-My views on school climate Screen ID: sep-survey-management-008 ✕

▼

q1. Have you ever browsed the website of the school your child attends?

q2. No browsing because: (choose one or more)

▼ q3. Do you agree with the following statements about IT teaching and application?

q3-a. b. Teaching with information technology can improve students' ability to use information technology

q3-b. a. Teaching with IT can enhance students' confidence in using IT

q4. Rank

q5. The school establishes different channels for the staff, students and parents to express their opinions.

q6. The school actively reports its self-evaluation findings to the staff, students and parents.

q7. The school systematically collects evaluation data, with a focus on students' whole-person development, for a holistic review of its work effectiveness.

q8. The school effectively monitors the implementation of its work.

q9. The school's decision-making process is transparent.

q10. The school promotes collaboration among the staff to jointly implement school plans.

q11. During a typical week, on how many days do you engage in the following activities?

q12. Further comments or suggestions on the arrangements of FI:

q13. Comments

q14. Subject(s) / Theme involved in the FI

⌂ Cancel ⌂ Confirm

8.2.7 Clone Survey

1) Mouse over “School-based Survey Management” and then click “Manage School-based Survey”.

2) Click ”Clone Survey” next to the survey to be cloned.

Manage School-based Survey Screen ID: sep-survey-management-001

Survey Type: School-based survey

+ Add

Questionnaire Title	Questionnaire Objectives	Status	Imported Survey	Operation
My views on school climate	My views on school climate	Normal	N	⌂ View ⌂ Edit ⌂ Delete ⌂ Edit Question ⌂ Set Question Order ⌂ Clone Survey
My views on teachers' professional development	professional development	Normal	N	⌂ View ⌂ Edit ⌂ Delete ⌂ Edit Question ⌂ Set Question Order ⌂ Clone Survey

3) Select “Year” to be cloned to.

4) Click “Confirm” to complete the clone.

SEP Questionnaire-Clone-My views on school climate Screen ID: sep-survey-management-009 ✕

* Year 2022-23

⌂ Cancel ⌂ Confirm

8.3 Manage School-based Survey Items

“Manage School-based Survey Items” module is used to manage survey items.

Note:

You can use Stem Question to manage the same type of questions.

-	Question Name	Question Stem
<input checked="" type="checkbox"/>	Do you agree with the following statements about IT teaching and application?	
<input type="checkbox"/>	a. Teaching with IT can enhance students' confidence in using IT	
<input type="checkbox"/>	b. Teaching with information technology can improve students' ability to use information technology	

8.3.1 Create Question Stem

- 1) Mouse over “School-based Survey Management” and then click “Manage School-based Survey Items”.
- 2) Click “Add” to create new question.

Manage School-based Survey Items Screen ID: sep-question-management-001

Question Name Questionnaire Title Assignment Status

Question Key	Questionnaire Title	Question Type	English Name	Chinese Name	Operation
<input type="checkbox"/> 45	My views on school climate	Standard Single Choice 5	a. Teaching with IT can enhance students' confidence in using IT	a. 以資訊科技教學，能加強學生運用資訊科技的信心	<input type="button" value="Edit"/>

- 3) In “Add Question” page:

- Select “Y” for “Add Question Stem” and input question content.
- Click “Confirm” to save the question setting.

Add Question Screen ID: sep-question-management-002

* Add Question Stem

* Question Content
(Eng)

* Question Content
(Chi)

For example:

Add Question

Screen ID: sep-question-management-002 X

* Add Question Stem

* Question Content
(Eng)

* Question Content
(Chi)

Manage School-based Survey Items

Screen ID: sep-question-management-001

Question Name Questionnaire Title Assignment Status

Question Key	Questionnaire Title	Question Type	English Name	Chinese Name	Operation
<input type="checkbox"/> 28		Question Stem	Do you agree with the following statements about IT teaching and application?	你同意以下有關資訊科技和應用的說法嗎?	<input type="button" value="Edit"/>

4) Click “Add” to create a new question. Select “N” for “Add Question Stem” and input question content. Choose the Question Stem marked in Step 3 for “Question Stem”.

Add Question

Screen ID: sep-question-management-002 X

* Add Question Stem

* Question Type

* Question Content
(Eng)

* Question Content
(Chi)

* If Required

Question Stem
Content

Options List

Serial Number	Options (Eng)	Options (Chi)
1	<input type="text" value="Strongly Disagree"/>	<input type="text" value="最不同意"/>
2	<input type="text" value="Disagree"/>	<input type="text" value="不太同意"/>
3	<input type="text" value="Agree"/>	<input type="text" value="相當同意"/>
4	<input type="text" value="Strongly Agree"/>	<input type="text" value="極之同意"/>

- 5) Mouse over “School-based Survey Management” and then click “Manage School-based Survey”.
Click “View” to preview the survey design. Another question with the same question stem can be added by following Step 4 above, if needed.

Home

System Tools

User Management

Survey Management

Data Input

Report Management

Data Submission

School-based Survey Management

Manage School-based Survey

Manage School-based Survey

Survey Type

School-based survey

Questionnaire Title

Q Questionnaire Title

Q Search

Add

Questionnaire Title	Questionnaire Objectives	Imported Survey	Operation
School-based Survey - Mathematics	School-based Survey - Mathematics	N	View
School-based Survey - English Language	School-based Survey - English Language	N	View
School-based Survey - Chinese Language	School-based Survey - Chinese Language	N	View
School-based Survey 3	Copy Qu	N	View
School-based Survey	IT	N	View

School-based Survey-School-based Survey

The questionnaire was conducted anonymously.
1. Do you agree with the following statements about IT teaching and application?

Item	Strongly Disagree	Disagree	Agree	Strongly Agree
Teaching with IT can enhance students' confidence in using IT	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Teaching with IT can improve students' ability to use IT	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

8.3.2 Create General Question

- 1) Mouse over “School-based Survey Management” and then click “Manage School-based Survey Items”.
- 2) Click “Add” to create a new question.

Manage School-based Survey Items

Screen ID: sap-question-management-001

Question Name

Q Question Name

Questionnaire Title

Q Questionnaire Title

Assignment Status

Select

Q Search

Add

Delete

Batch Import

File Template

Hint

Question Key	Questionnaire Title	Question Type	English Name	Chinese Name	Operation
<input type="checkbox"/> 45	My views on school climate	Standard Single Choice 5	a. Teaching with IT can enhance students' confidence in using IT	a. 以資訊科技教學，能加強學生運用資訊科技的信心	Edit

- 3) In “Add Question” page:

- Select “N” for “Add Question Stem” and select the appropriate Question Stem.

Add Question

Screen ID: sep-question-management-002 X

* Add Question Stem

* Question Type

* Question Content
(Eng)

* Question Content
(Chi)

* If Required

Question Stem
Content

- Input question content
- Click “Confirm” to save the question setting.

8.3.3 Edit Question

- 1) Mouse over “School-based Survey Management” and then click “Manage School-based Survey Items”.
- 2) Input searching criteria, such as “Question Name”, “Questionnaire Title”, “Assignment Status” and click “Search”.
- 3) Click “Edit” next to the question to be modified.

Manage School-based Survey Items

Question Name Questionnaire Title Assignment Status

	Question Key	Questionnaire Title	Question Type	English Name	Chinese Name	Operation
<input type="checkbox"/>	45	My views on school climate	Standard Single Choice 5	a. Teaching with IT can enhance students' confidence in using IT	a. 以資訊科技教學，能加強學生運用資訊科技的信心	<input type="button" value="Edit"/>

- 4) Input the question information and click “Confirm” to save the setting.

Edit Question-18

Screen ID: sep-question-management-003 X

* Add Question Stem

* Question Type

* Question Content
(Eng)

* Question Content
(Chi)

* If Required

Question Stem
Content

8.3.4 Delete Question

- 1) Mouse over “School-based Survey Management” and then click “Manage School-based Survey Items”.
- 2) Input searching criteria, such as “Question Name”, “Questionnaire Title”, “Assignment Status” and click “Search”.
- 3) Select the question to be deleted and click “Delete”.

Manage School-based Survey Items

Question Name: Questionnaire Title: Assignment Status:

Question Key	Questionnaire Title	Question Type	English Name	Chinese Name	Operation
45	My views on school climate	Standard Single Choice 5	a. Teaching with IT can enhance students' confidence in using IT	a. 以資訊科技教學，能加強學生運用資訊科技的信心	<input type="button" value="Edit"/>

- 4) Click “Confirm” to confirm the deletion.

Reminder

Confirm Delete?

8.3.5 Download File Template

- 1) Mouse over “School-based Survey Management” and then click “Manage School-based Survey Items”.
- 2) Click “File Template” to download the Excel file template for importing questions.
- 3) Click “Save” to save the file to your computer.

Manage School-based Survey Items

Question Name: Questionnaire Title: Assignment Status:

Question Key	Questionnaire Title	Question Type	English Name	Chinese Name	Operation
45	My views on school climate	Standard Single Choice 5	a. Teaching with IT can enhance students' confidence in using IT	a. 以資訊科技教學，能加強學生運用資訊科技的信心	<input type="button" value="Edit"/>

	A	B	C	D	E
1	Question Type	Question Title (English)	Question Title (Chinese)	Question Order	Mandatory
2					

行 Column	題型 / 內容	Question Type / Content	代號 Symbol
A	單選題 (4 選 1)	Multiple Choice Question (1 out of 4)	F
	單選題 (5 選 1)	Multiple Choice Question (1 out of 5)	G
	多選題	Multiple Answers Question	B
	填充題	Fill-in-the-blank Question	C
	問答题	Text Area	D
B	英文題目	Question Title in English	填寫題目內容 Input question

C	中文題目	Question Title in Chinese	填寫題目內容 Input question
D	題目次序	Question Order	1, 2, 3 ...
E	是否必答	Mandatory	如屬必答，請填 “Y”；否則，請填 “N” If yes, please fill in “Y”; otherwise, please fill in “N”

8.3.6 Batch Import Questions

Prerequisite:

Prepare an Excel file with the file template for importing questions according to the sample below.

- 1) Mouse over “School-based Survey Management” and then click “Manage School-based Survey Items”.
- 2) Click “Batch Import” to import question in batch.

Manage School-based Survey Items Screen ID: sep-question-management-001

Question Name Questionnaire Title Assignment Status

	Question Key	Questionnaire Title	Question Type	English Name	Chinese Name	Operation
<input type="checkbox"/>	45	My views on school climate	Standard Single Choice 5	a. Teaching with IT can enhance students' confidence in using IT	a. 以資訊科技教學，能加強學生運用資訊科技的信心	<input type="button" value="Edit"/>

- 3) In the “Import” page, click “Choose File” to select the file.
- 4) Click “Import” to add questions.

Import Screen ID: sep-question-management-004

Note: Duplicated imports will overwrite data which already saved.

Example Using the Excel file template to import questions for different subjects

Schools may use the Excel file template to upload all questions for the same or similar surveys designed for different subjects/groups. Schools can edit individual questions via the interface, when necessary, and then set the surveys for different subjects/groups by selecting the appropriate questions. Schools may refer to the following steps.

1) To download the Excel file template and input the required questions for different subjects according to Section 8.3.4.

	A	B	C	D	E
1	Question Type	Question Title (English)	Question Title (Chinese)	Question Order	Mandatory
2	F	Qu 1 - Chinese Language	問題 1 - 中文科	1	N
3	F	Qu 2 - Chinese Language	問題 2 - 中文科	2	N
4	F	Qu 3 - Chinese Language	問題 3 - 中文科	3	N
5	F	Qu 1 - English Language	問題 1 - 英文科	1	N
6	F	Qu 2 - English Language	問題 2 - 英文科	2	N
7	F	Qu 3 - English Language	問題 3 - 英文科	3	N
8	F	Qu 1 - Mathematics	問題 1 - 數學科	1	N
9	F	Qu 2 - Mathematics	問題 2 - 數學科	2	N
10	F	Qu 3 - Mathematics	問題 3 - 數學科	3	N

2) To import the questions according to Section 8.3.5, the system will show all questions after importing successfully. Schools may edit the questions according to Section 8.3.2, when necessary.

Manage School-based Survey Items Screen ID: sep-question-management-001

Question Name Questionnaire Title Assignment Status

Question Key	Questionnaire Title	Question Type	English Name	Chinese Name	Operation
<input type="checkbox"/> 27		Multiple Choice Question (1 out of 4)	Qu 3 - Mathematics	問題 3 - 數學科	Edit
<input type="checkbox"/> 26		Multiple Choice Question (1 out of 4)	Qu 2 - Mathematics	問題 2 - 數學科	Edit
<input type="checkbox"/> 25		Multiple Choice Question (1 out of 4)	Qu 1 - Mathematics	問題 1 - 數學科	Edit
<input type="checkbox"/> 24		Multiple Choice Question (1 out of 4)	Qu 3 - English Language	問題 3 - 英文科	Edit
<input type="checkbox"/> 23		Multiple Choice Question (1 out of 4)	Qu 2 - English Language	問題 2 - 英文科	Edit
<input type="checkbox"/> 22		Multiple Choice Question (1 out of 4)	Qu 1 - English Language	問題 1 - 英文科	Edit
<input type="checkbox"/> 21		Multiple Choice Question (1 out of 4)	Qu 3 - Chinese Language	問題 3 - 中文科	Edit
<input type="checkbox"/> 20		Multiple Choice Question (1 out of 4)	Qu 2 - Chinese Language	問題 2 - 中文科	Edit
<input type="checkbox"/> 19		Multiple Choice Question (1 out of 4)	Qu 1 - Chinese Language	問題 1 - 中文科	Edit

3) To set the survey for different subjects according to Section 8.2.1 Create New Survey and Section 8.2.5 Select Question.

Manage School-based Survey

Survey Type School-based survey Questionnaire Title

Questionnaire Title	Questionnaire Objectives	Imported Survey	Operation
School-based Survey - Mathematics	School-based Survey - Mathematics	N	View Edit Delete Select Question Set Question Order Clone Survey
School-based Survey - English Language	School-based Survey - English Language	N	View Edit Delete Select Question Set Question Order Clone Survey
School-based Survey - Chinese Language	School-based Survey - Chinese Language	N	View Edit Delete Select Question Set Question Order Clone Survey

Question Name
Question Type Select
Search

	Question Name	Question Type
<input type="checkbox"/>	Qu 3 - Mathematics	Multiple Choice Question (1 out of 4)
<input type="checkbox"/>	Qu 2 - Mathematics	Multiple Choice Question (1 out of 4)
<input type="checkbox"/>	Qu 1 - Mathematics	Multiple Choice Question (1 out of 4)
<input type="checkbox"/>	Qu 3 - English Language	Multiple Choice Question (1 out of 4)
<input type="checkbox"/>	Qu 2 - English Language	Multiple Choice Question (1 out of 4)
<input type="checkbox"/>	Qu 1 - English Language	Multiple Choice Question (1 out of 4)
<input checked="" type="checkbox"/>	Qu 3 - Chinese Language	Multiple Choice Question (1 out of 4)
<input checked="" type="checkbox"/>	Qu 2 - Chinese Language	Multiple Choice Question (1 out of 4)
<input checked="" type="checkbox"/>	Qu 1 - Chinese Language	Multiple Choice Question (1 out of 4)

Cancel
Confirm

The questionnaire was conducted anonymously.

	Item	Strongly Disagree	Disagree	Agree	Strongly Agree
1.	Qu 1 - Chinese Language	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2.	Qu 2 - Chinese Language	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3.	Qu 3 - Chinese Language	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

4) To publish the related school-based survey according to Section 4.2.10.

Survey Management
Publish Survey
Manage Survey
Fill In Survey
Data Input
Report Management
Data Submission
School-based Survey Management

Teacher Questionnaire
Student Questionnaire
Parent Questionnaire
Inspection Related Surveys
Questionnaire on ESR
Questionnaire on FI
Questionnaire on Comprehensive Review
Questionnaire on School Development and Accountability Framework
School-based Survey
School-based Survey - Mathematics
School-based Survey - English Language
School-based Survey - Chinese Language

Download Template
Preview
Published Survey: 1
Download Template
Preview
Published Survey: 1
Publish
Download Template
Preview
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Publish
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Publish
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Publish
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Published Survey: 0
Publish
Published Survey: 0
Publish
Published Survey: 0

Note:

Each question can only be assigned to one survey. Schools may clone the related survey if different subjects/groups use some identical questions (for details, please refer to Section 8.2.7 Clone Survey). Then, delete the inappropriate questions and add other questions for preparing different surveys.

Appendix 1 Setup ESDA to Use Other Port

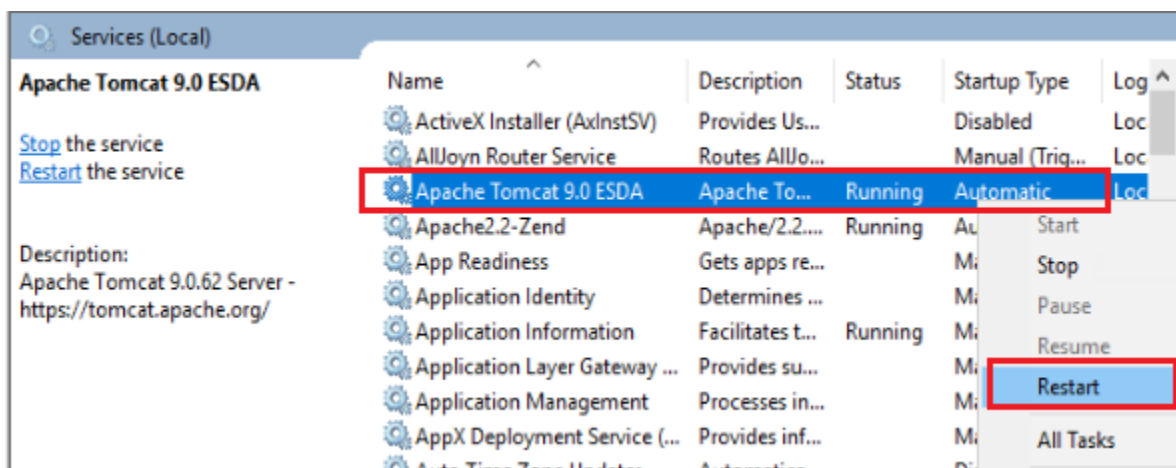
The ESDA system uses the “Port 443” by default. If the server has used the “Port 443” for other purposes, System Administrator can follow the steps below to set ESDA to use another port.

- 1) Follow the steps in Chapter 1 to install ESDA.
- 2) Edit Apache Tomcat configuration file (e.g. C:\esda_new\Apache_Tomcat_9.0\conf\server.xml), change the “Port 443” to other port (e.g. 8443).

```
<Connector port="80" protocol="HTTP/1.1"
connectionTimeout="20000"
redirectPort="443" />

<Connector
protocol="org.apache.coyote.http11.Http11NioProtocol"
port="443" maxThreads="200"
scheme="https" secure="true" SSLEnabled="true"
keystoreFile="conf/.keystore" keystorePass="changeit"
clientAuth="false" sslProtocol="TLS" URIEncoding="UTF-8"/>
```

- 3) Restart Apache Tomcat server.



- 4) Follow the steps in Section 1.2.3 to test the system with the new port (e.g. https://127.0.0.1:8443/school).

Appendix 2 Install ESDA to Other Windows System

System Administrator may follow the steps in Section 1.2 – 1.4 to install, test, and set up ESDA on other Windows platform systems (except Windows Server 2016).

1) License Issues on Installation of ESDA to Windows Workstation (including Windows 10)

According to the information from Microsoft, schools are reminded that the maximum numbers of concurrent access to the workstation computers for Internet Information Services are as follows:

Microsoft Windows Platform	Max device connections
Windows 10	20

For details, please refer to the End User License Agreement (EULA) which comes with the product accordingly or from the following website:

<https://www.microsoft.com/en-us/Useterms>.

2) Notes to Installation on Windows Server 2016

Windows Server 2016 is more secure. Modifying files in the C:\Program Files directory is restricted. Therefore, installing the system to other directories is recommended, e.g. D:\esda or default C:\esda.

3) Notes to Installation on Windows Server 2016 R2 (64-bit)

Windows Server 2016 R2 is a 64-bit system. ESDA5.0.x has also been tested under this version.

Appendix 3 Cross-Platform Migration Procedures

1) Login system as System Administrator.

System Overview • System Backup

System Backup Screen ID: system-backup-001

Program Package Version: v5.1.13 Data Package Version: v1.3.5

Installation Directory: D:\esda_new Backup file directory: D:\esda_backup

[Manual backup](#)

Database backup records

File Name	Backup Date	Backup Method	Action
No Data			

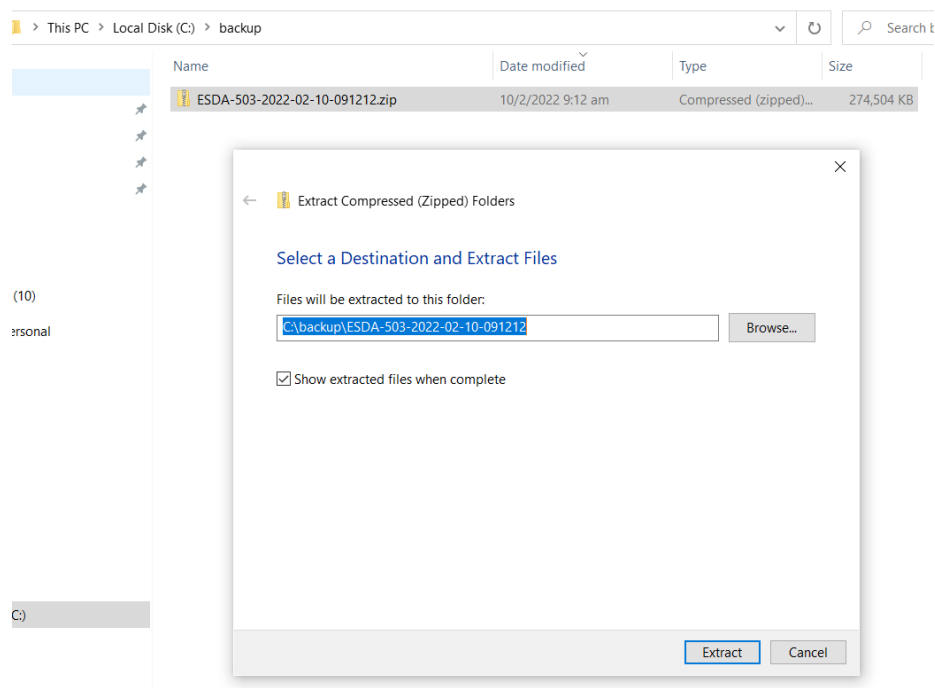
2) In the left directory, click “System Tools” and then click “System Backup”. Click “Manual Backup” and the system will generate a backup file to the backup file directory.

Note:

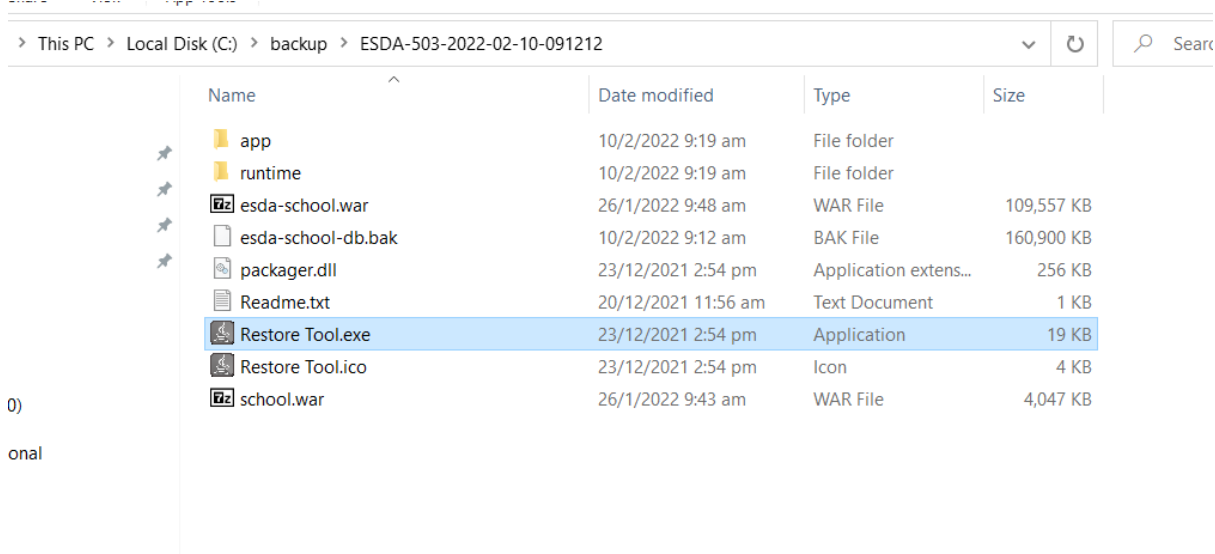
- System Administrator, please move the backup file to a safe place.

System Restore Procedures

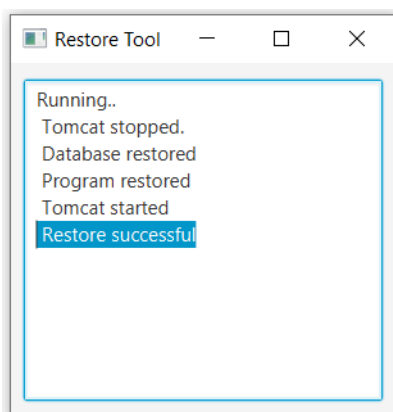
1) Unzip the backup file.



2) Run Restore Tool.exe as Administrator.

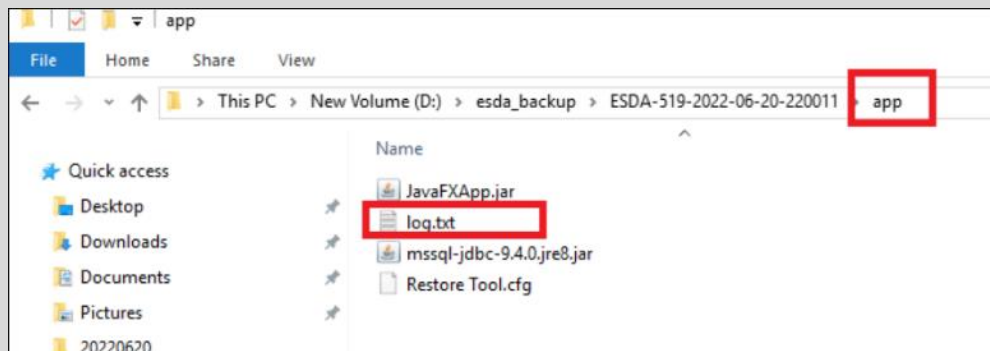


3) The data recovery will be started.



Note:

- If error is found during the restoration, please send the log file (\app\log.txt) to the Indicators Section of EDB.



Appendix 4 ESDA File Structures and Software Components

ESDA includes the following components:

1) Windows Installation

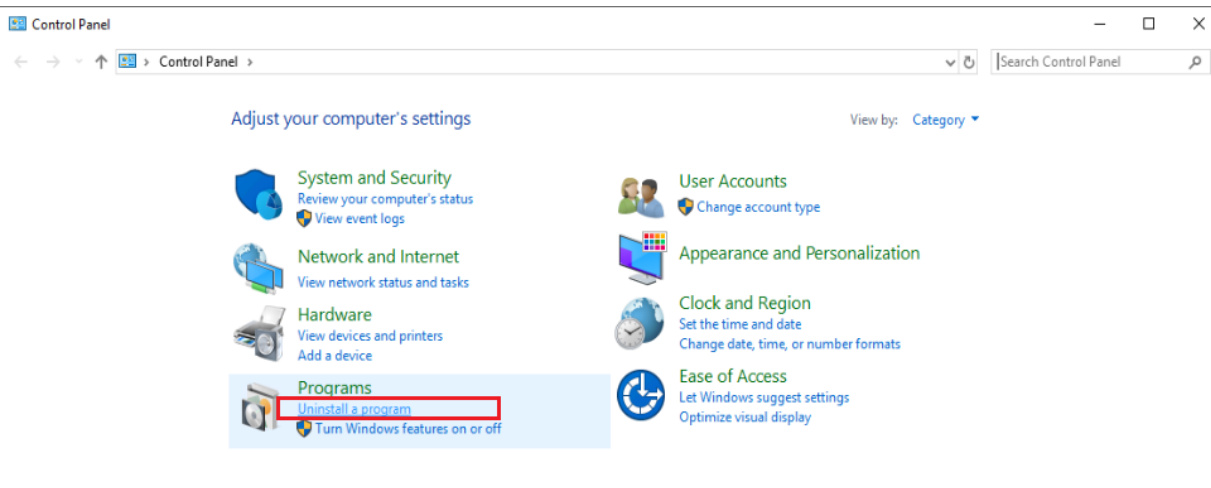
Components	Version	Default Path
Tomcat	9.0.x	C:\esda_new\apache-tomcat-9.0.45
MSSQL	2019	C:\Program Files\Microsoft SQL Server
ESDA	5.0.x	C:\esda_new
OpenJDK	8	C:\esda_new\apache-tomcat-9.0.45

* This is the default installation path of ESDA system; other paths below are relative to this.

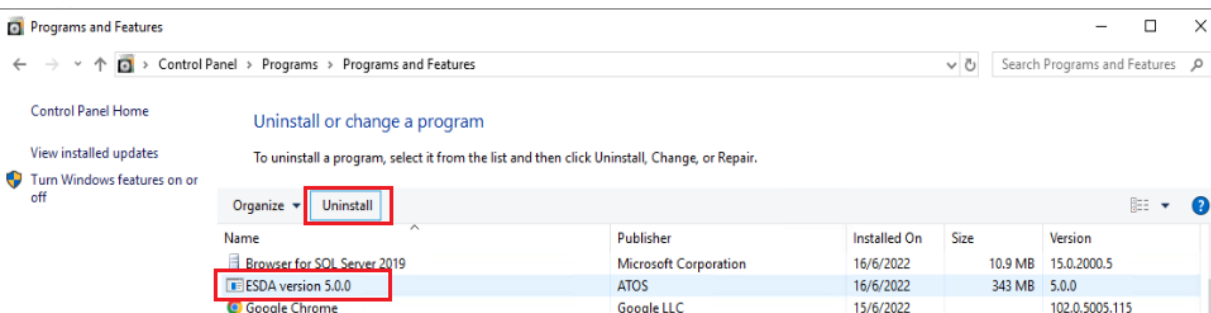
Appendix 5 Uninstalling ESDA

System Administrator may follow the procedures below to uninstall ESDA.

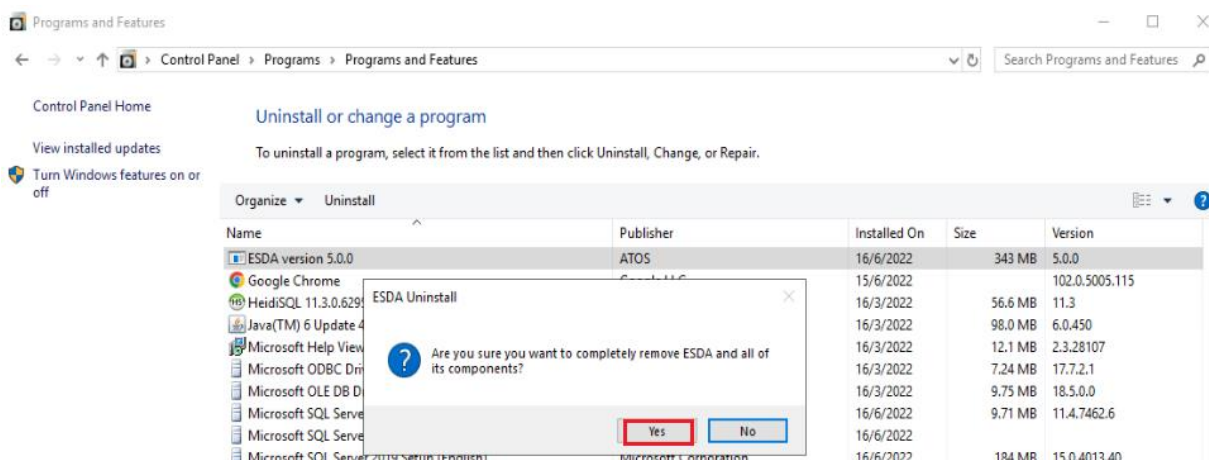
- 1) Open Control Panel and click “Remove Programs”.



- 2) Select “ESDA version 5.0.x”, click “Uninstall”.



- 3) Click “Yes” to confirm uninstalling ESDA.



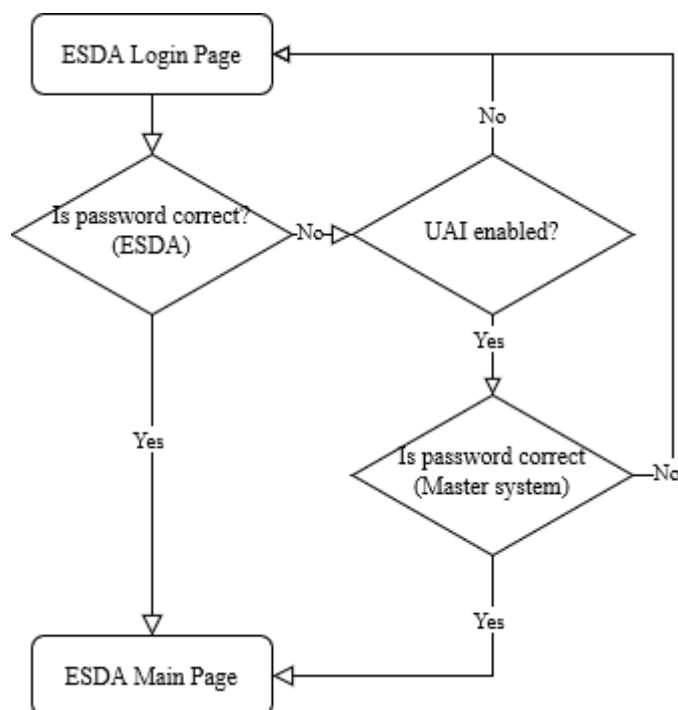
Appendix 6 User Account Integration with Other System(s)

A) Planning for the Integration

System Administrator can use the User Account Integration (UAI) feature to integrate any system, including OpenLDAP, Active Directory, or any database with ESDA user accounts. Basically, TCP/IP is used for the connection between systems. In order to achieve system integration, a connection between ESDA and the main system must be in place.

System Administrator needs to add a “custom-authentication.jar” program file to “[ESDA]\Apache_Tomcat_9.0\webapps\esda-school\WEB-INF\lib” to activate “User Account Integration (UAI)”.

When set up is completed, System Administrator can start pairing ESDA with the user accounts of the main system. System Administrator can perform a simple test by selecting a user account (e.g. admin) for the “User Account Consolidation (UAI) (the user account must exist in both ESDA and main system). Then use the ESDA account (e.g. admin) and the account's password in the main system to login to ESDA.



B) Configuring ESDA for the Integration

System Administrator should follow the following steps to activate User Account Integration (UAI):

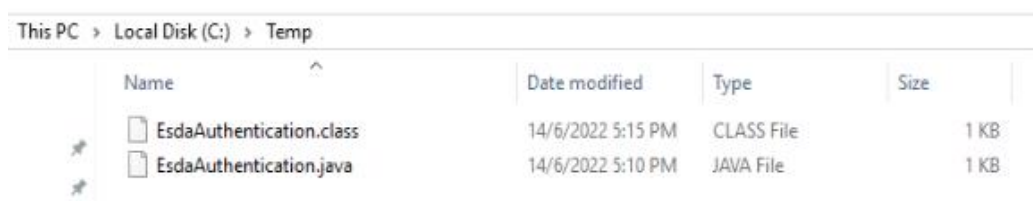
- 1) Build a Java source code file EsdaAuthentication.java at the server, e.g. C:\Temp\EsdaAuthentication.java. User needs to write the account authentication program in a source code file with the following format. When “User Account Integration (UAI)” is launched, the following program will be executed as the account authentication standard.

```
package hk.edb;  
import hk.esda.auth.OpenAuthentication;  
public class EsdaAuthentication implements OpenAuthentication {  
    public boolean authentication(String loginName, String password, String remoteId){  
        // Write your code here to validate the user account with the master system  
        // Return true if the authentication is ok; otherwise, return false.  
    }  
}
```

- 2) Open “Command Prompt”, use javac program tool to compile the .java file with ESDA “edb-common-auth-1.0-SNAPSHOT.jar”.

```
"%JAVA_HOME%\bin\javac" -cp "C:\esda_new\Apache_Tomcat_9.0\webapps\esda-school\WEB-INF\lib\edb-common-auth-1.0-SNAPSHOT.jar" C:\Temp\EsdaAuthentication.java
```

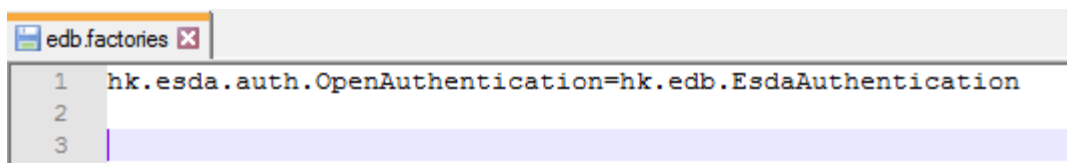
- 3) EsdaAuthentication.class file will be generated at C:\Temp\.



This PC > Local Disk (C:) > Temp				
Name	Date modified	Type	Size	
EsdaAuthentication.class	14/6/2022 5:15 PM	CLASS File	1 KB	
EsdaAuthentication.java	14/6/2022 5:10 PM	JAVA File	1 KB	

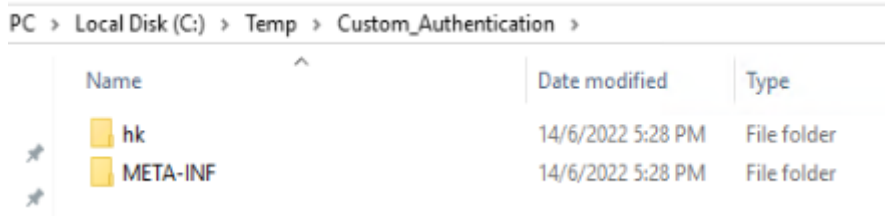
- 4) Create edb.factories file at server, e.g. C:\Temp\edb.factories, write the following program to the file.

```
hk.esda.auth.OpenAuthentication=hk.edb.EsdaAuthentication
```



```
1 hk.esda.auth.OpenAuthentication=hk.edb.EsdaAuthentication  
2  
3
```

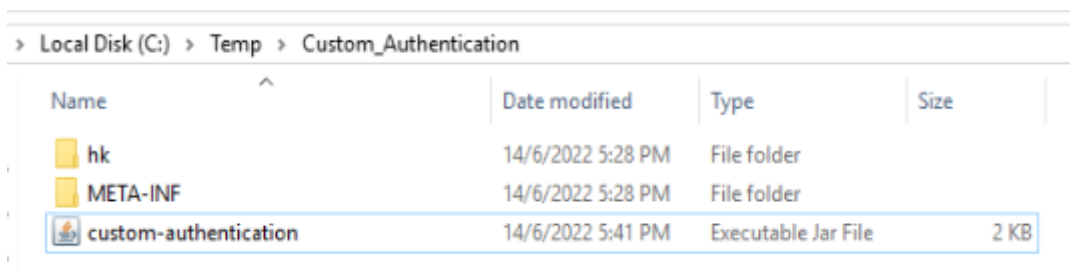
Custom_Authentication\META-INF\edb.factories



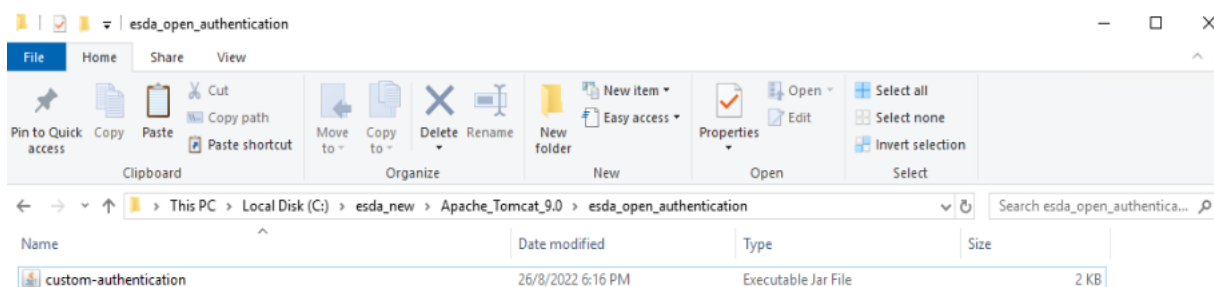
- 6) Open “Command Prompt” and change to folder “Custom_Authentication”. Use jar tool to setup jar program.

```
"%JAVA_HOME%\bin\jar" cvf custom-authentication.jar META-INF/ hk/
```

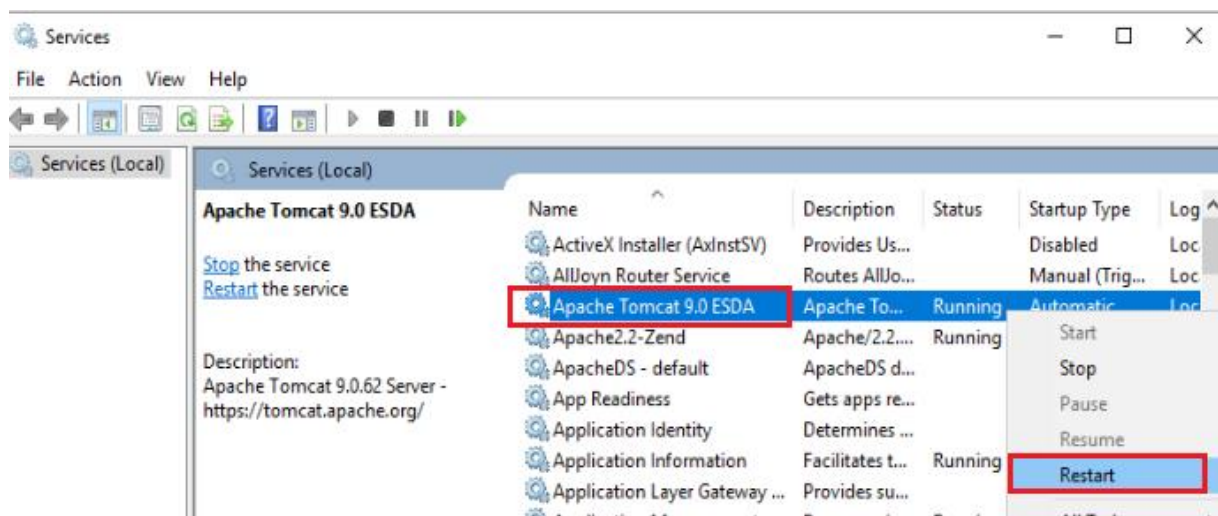
```
C:\Users\Administrator>cd C:\Temp\Custom_Authentication
C:\Temp\Custom_Authentication>"%JAVA_HOME%\bin\jar" cvf Custom_Authentication.jar META-INF/ hk/
added manifest
ignoring entry META-INF/
adding: META-INF/edb.factories(in = 61) (out= 47)(deflated 22%)
adding: hk/(in = 0) (out= 0)(stored 0%)
adding: hk/edb/(in = 0) (out= 0)(stored 0%)
adding: hk/edb/EsdaAuthentication.class(in = 373) (out= 240)(deflated 35%)
```



- 7) Copy the custom-authentication.jar to folder
“C:\esda new\Apache Tomcat 9.0\esda_open_authentication folder”.



8) Restart Apache Tomcat server.



C) Sample UAI coding

Below is an example for LDAP server:

```
// package name should be same as the one defined in edb.factories file
package hk.edb;

import hk.esda.auth.OpenAuthentication;
// For LDAP implementation
import java.util.Hashtable;
import javax.naming.AuthenticationException;
import javax.naming.Context;
import javax.naming.directory.DirContext;
import javax.naming.directory.InitialDirContext;

// class name should be same as the one defined in edb.factories file
public class EsdaAuthentication implements OpenAuthentication {
    // authentication method
    // The function name and function definition MUST NOT be changed.
    // loginName -> login id for login to remote system
    // password -> password key-in in login page
    // remoteId -> not require to use
    // return boolean, true for valid otherwise return false
    public boolean authentication(String loginName, String password, String remoteId){
        // This is a sample for LDAP.
```



```
// The following configurations should be updated for your environment
String url = "ldap://127.0.0.1:389";
String FullloginName = "CN=" + loginName + ",DC=esda,DC=test";

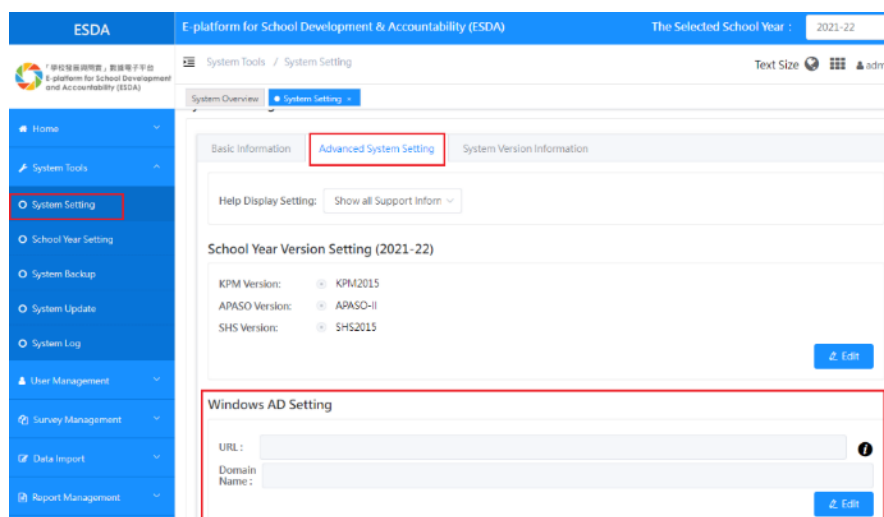
DirContext ctx=null;
Hashtable<String,String> hash = new Hashtable<String,String>();
hash.put(Context.INITIAL_CONTEXT_FACTORY,"com.sun.jndi.ldap.LdapCtxFactory");
hash.put(Context.SECURITY_AUTHENTICATION, "simple");
hash.put(Context.PROVIDER_URL, url); // URL of LDAP
hash.put(Context.SECURITY_PRINCIPAL, fullLoginName); // Login Name of LDAP
hash.put(Context.SECURITY_CREDENTIALS, password); // Password
hash.put("com.sun.jndi.ldap.connect.timeout", "5000"); // Timeout - 5s

try {
    ctx = new InitialDirContext(hash);
    System.out.println("Authentication success");
    return true;
} catch (AuthenticationException e) {
    System.out.println("Authentication fail");
    e.printStackTrace();
} catch (Exception e) {
    e.printStackTrace();
} finally{
    if(null!=ctx){
        try {
            ctx.close();
            ctx=null;
        } catch (Exception e) {
            e.printStackTrace();
        }
    }
}
return false;
}
```

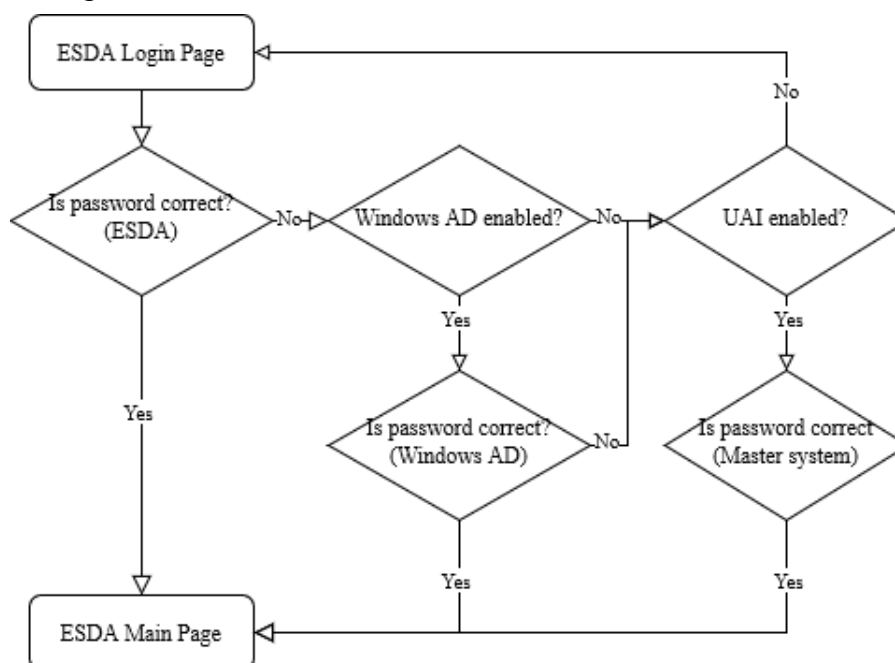
D) Integration with Windows Active Directory

In addition to the “UAI with other system(s)” mentioned in the above sections, ESDA supports authentication with Windows Active Directory. That is, the ESDA server will connect the Active Directory server for password validation.

For the integration with Windows Active Directory, System Administrator needs to update the Windows AD setting at ESDA (System Setting > Advanced System Settings), enter Windows ad IP address (e.g. ldap://192.168.200.199:389) and domain name (e.g. @esda.schoola.edu).



The authentication logic is as follows:



-- End --