CLOCKWORK

Training Manual and Reference: Alternate Format

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CLOCKWORK TRAINING ALTERNATE FORMAT

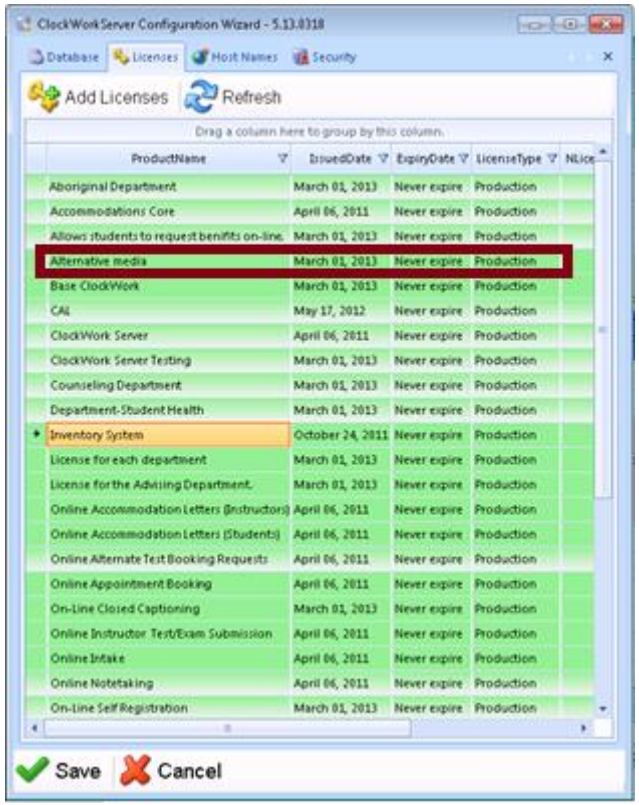
LEARNING OBJECTIVES

Become familiar with the Alternate Format interface
Create Media Content, Publisher, and Vendor
Create a new request
Create a job
Understand the difference between requests and jobs
Learn how to approve a request
Learn how to turn requests into jobs
Learn how to manage your volunteers
Learn what reports are available
Become familiar with the system`s workflow

License Key

- The Alternate format module is not going to work without its license key
- If the license key is not imported, please submit a support ticket
- In ClockWork, go to Extra tab > Submit a Support Ticket

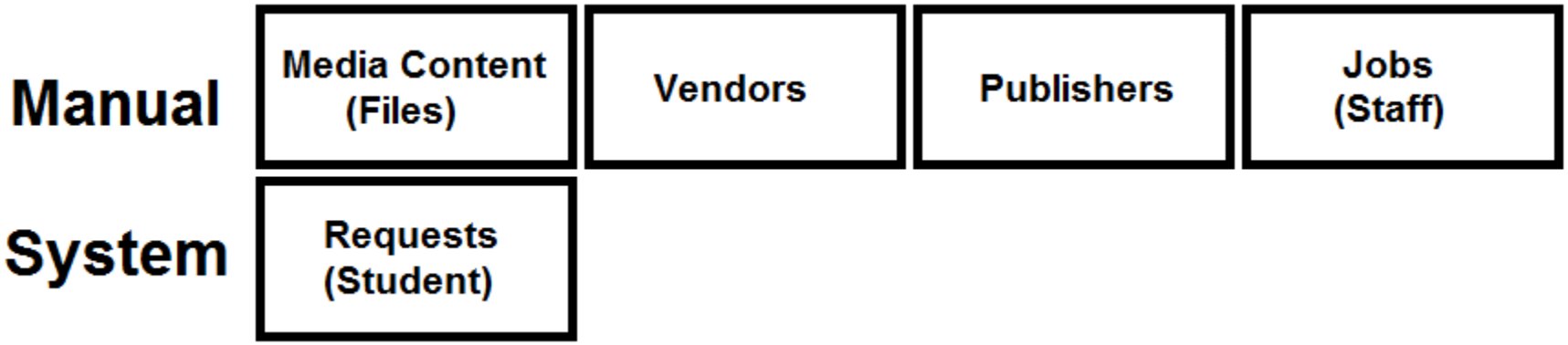
How do you know if the license key is not imported?



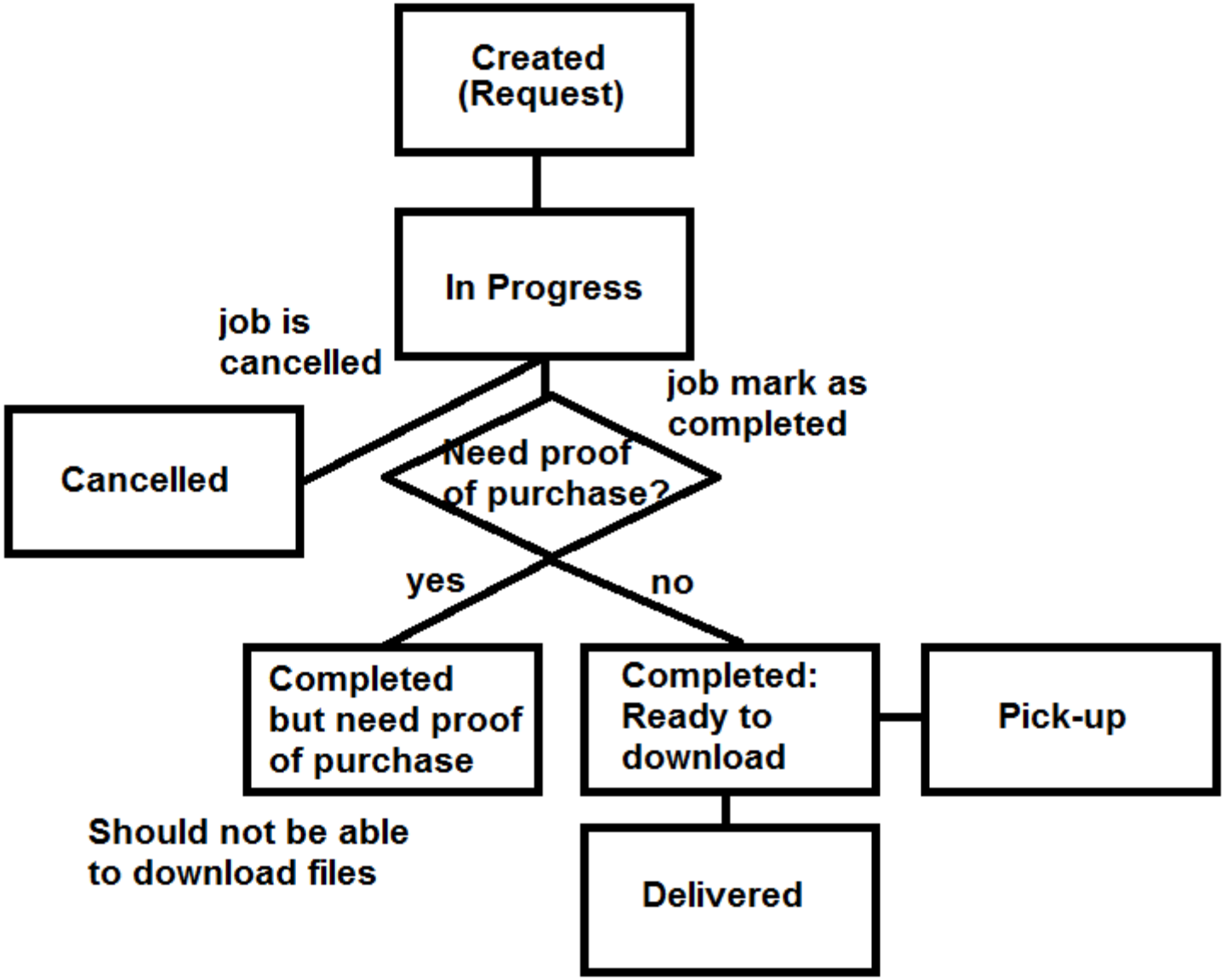
- On the server, go to Start > All Programs > TechnoPro > ClockWork 5 Server > Clockwork Server Initialization Wizard

- It should have ‘Alternate media’ in the Licenses tab

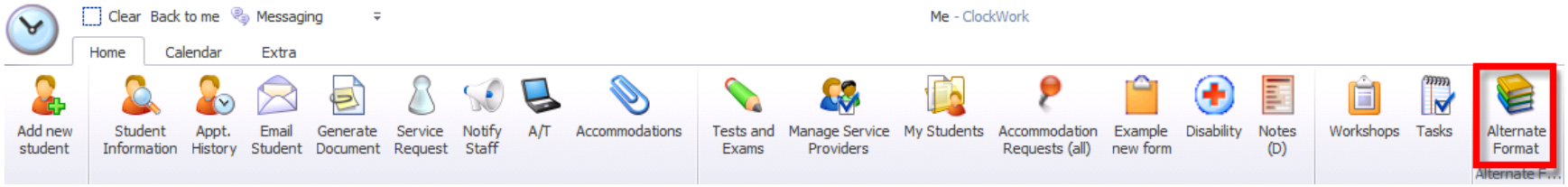
Parts of Alternate Format



Requests Workflow



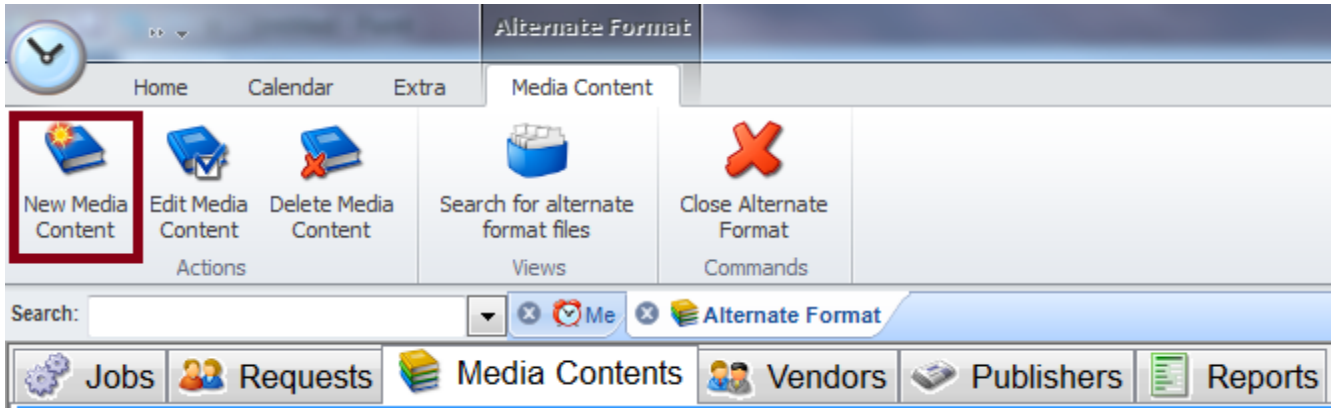
Accessing the Alternate Format



- There`s no setting or permission to turn on the Alternate Format module.
- As long as you have the license key for the Alternate Format, it should show up in your “Home” ribbon bar. This is automatic.
- The Alternate Format is on the top right side of your ClockWork screen

MEDIA CONTENT

How to add a new Media Content



- Click on the Media Contents tab
- The ribbon bar should change to Media Content
- Click on “New Media Content”
- You can also right-click and select “New Media Content”

You should get a screen like this.

Enter the book's information here.

Proof of purchased required?

Sometimes the student needs to submit a proof of purchase for the book(s) before they can download the material(s). If this is checked, the system is not going to allow them to download the material without its proof of purchase.

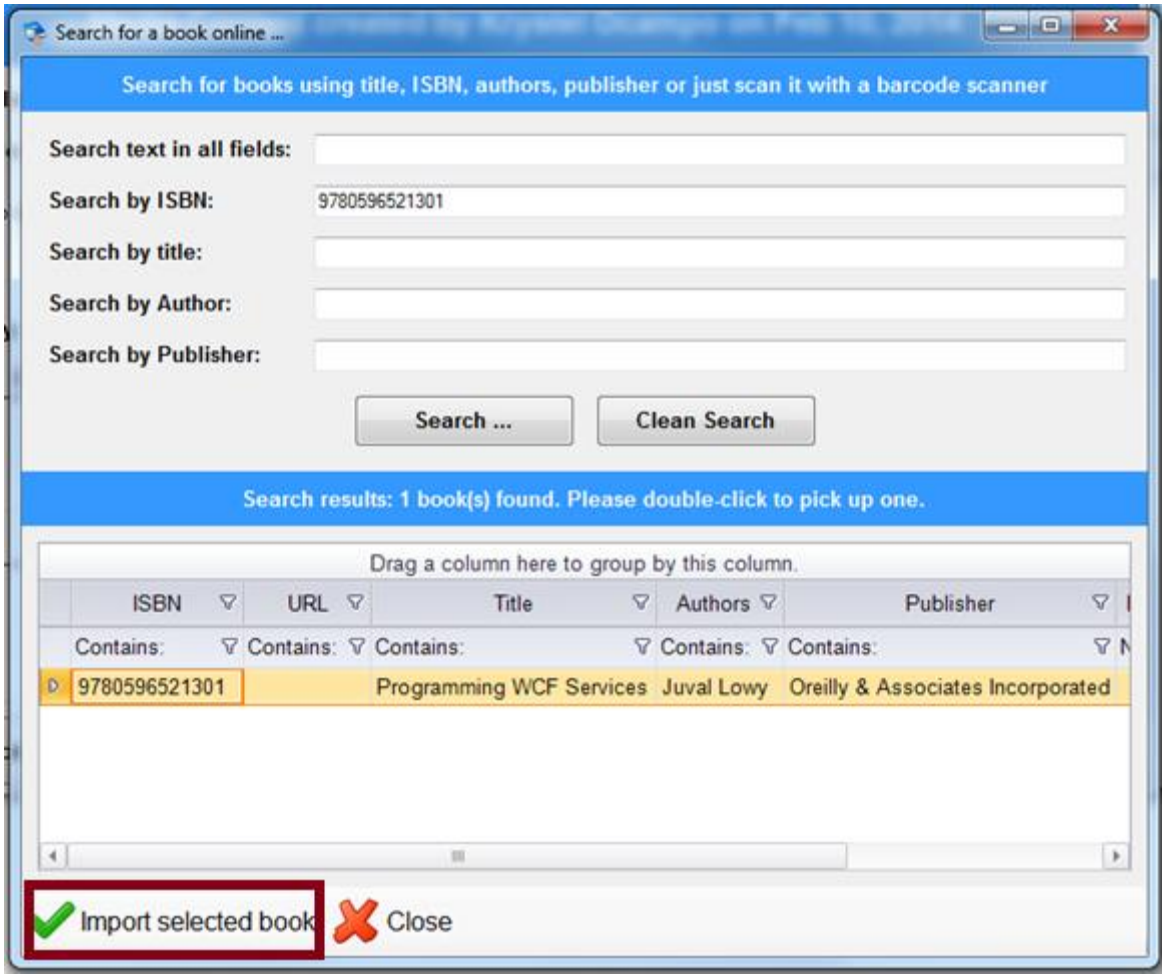
Is media content reusable?

Sometimes the books needs a permission from the publisher to distribute the alt format. Sometimes, the publisher only gives the alt format to one student with a proof of purchase. If this is checked, it means that the publisher allowed the school to distribute the alt format as many times they want.

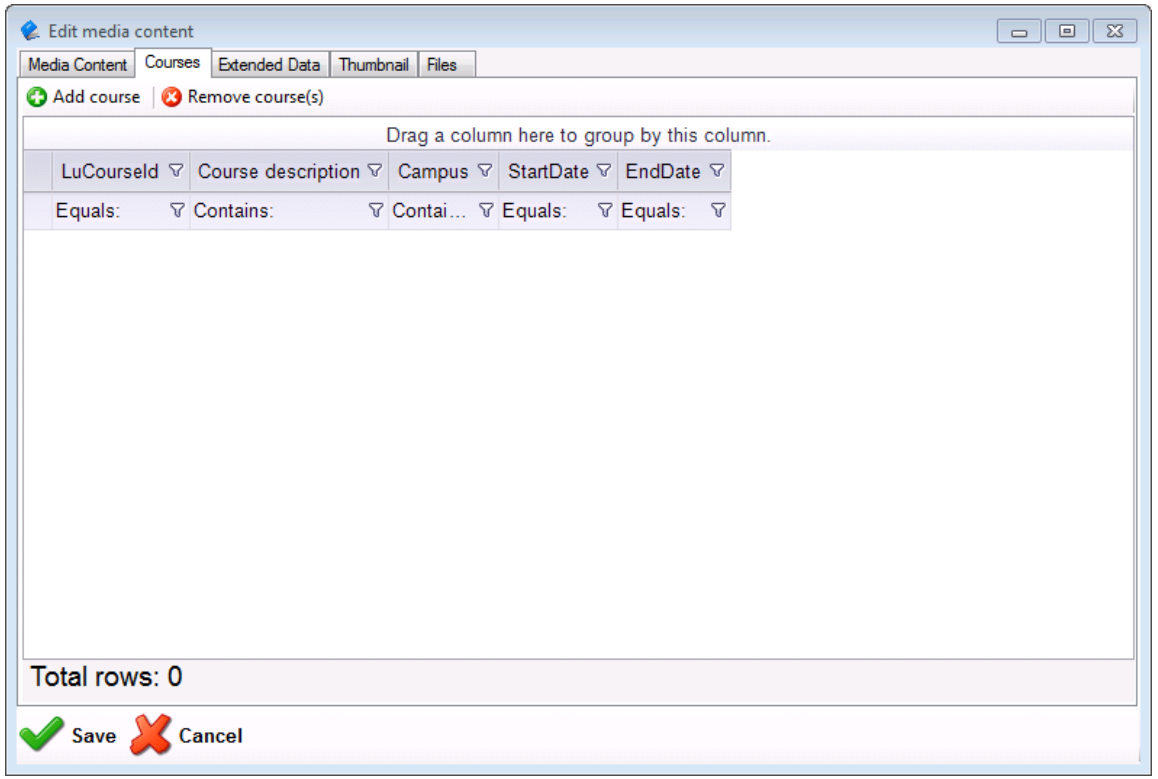
Is Active?

This just tells you if the media content is active or not.

***** Use a scanner to pull the book's information from the web *****

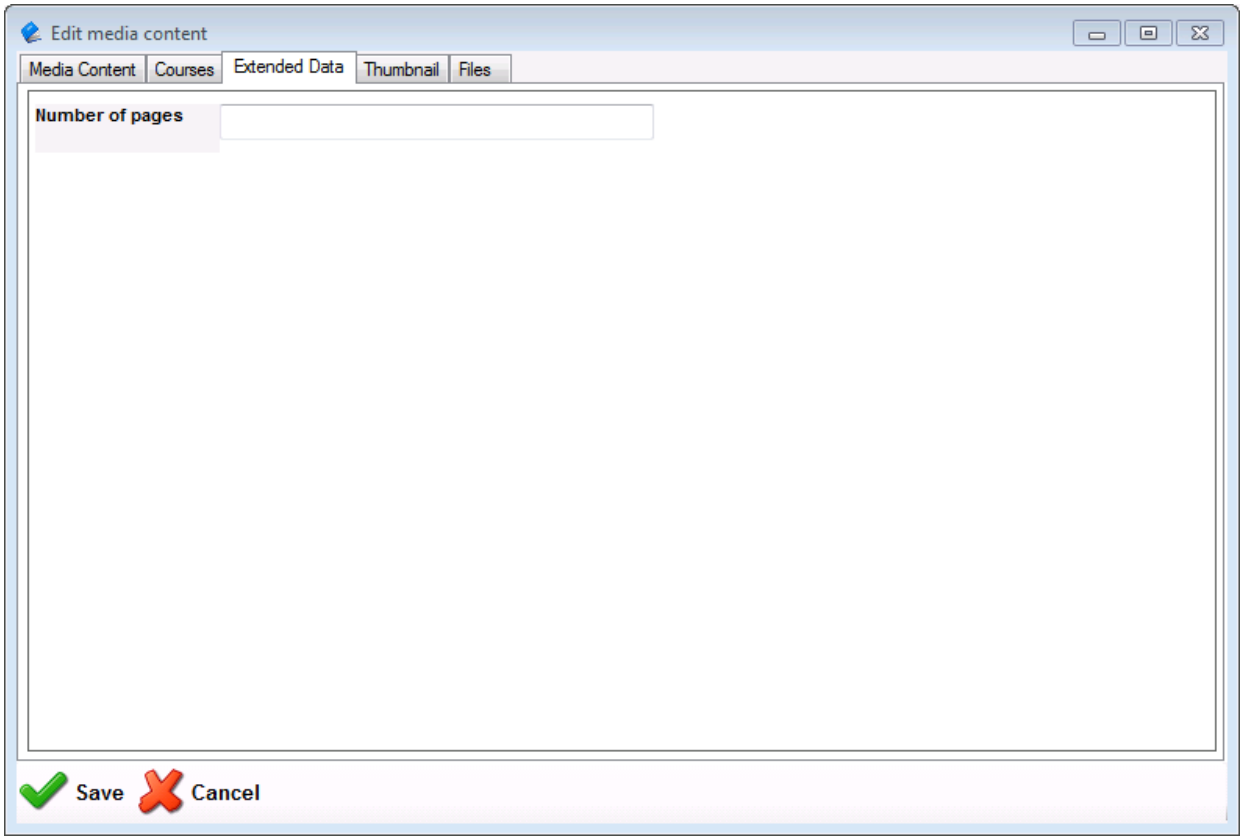


You just have to scan the ISBN of the book and ClockWork will automatically search for it on the web. Scanner: Adesso, Model No. NUSCAN2100U



Courses: Courses are linked to a student's account in ClockWork. If courses are not displayed that means the student does not have current active courses.

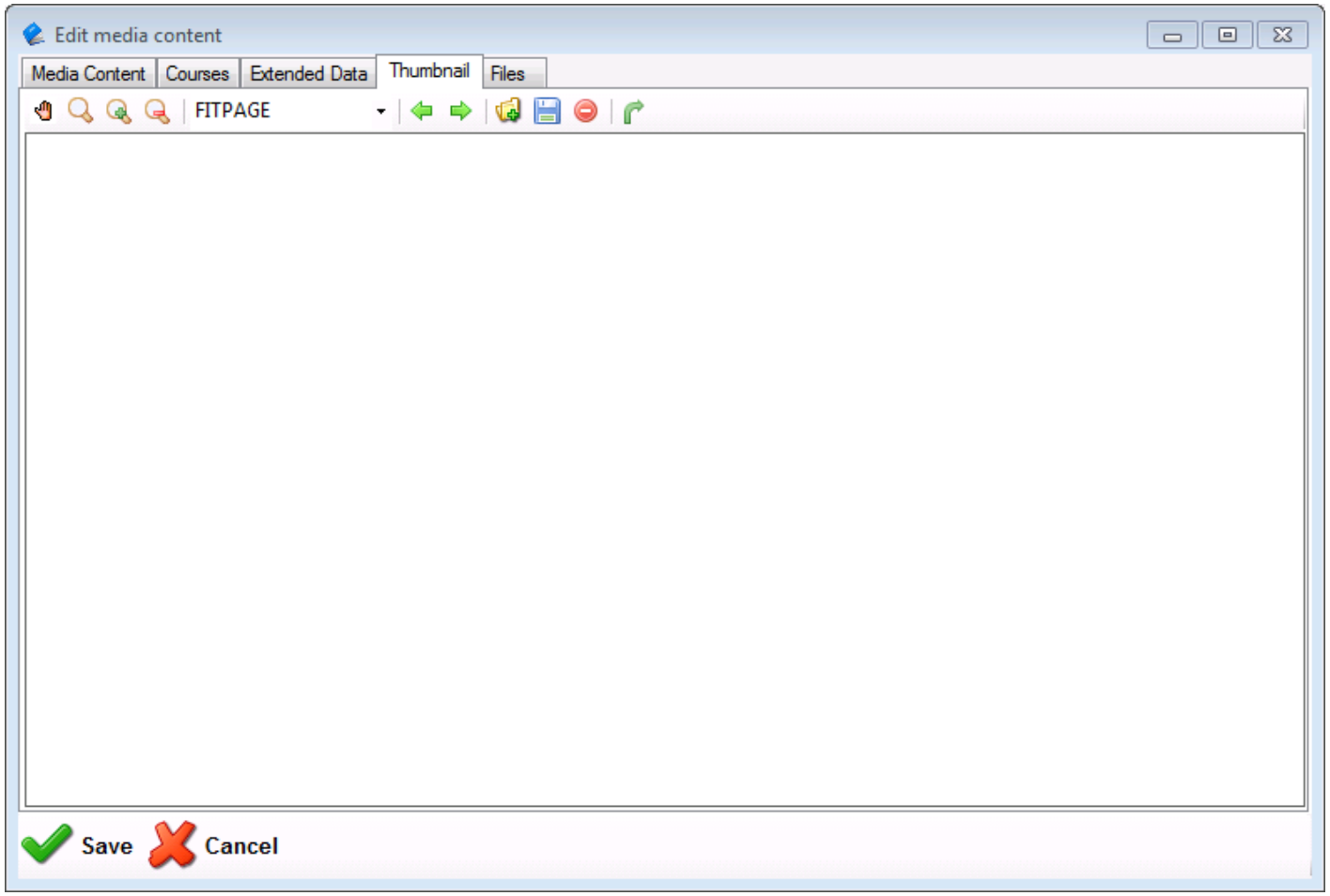
When you add a request, the request wizard filters the media content by the course.



Extended Data: This is a dynamic form that can be setup in ClockWork Admin.

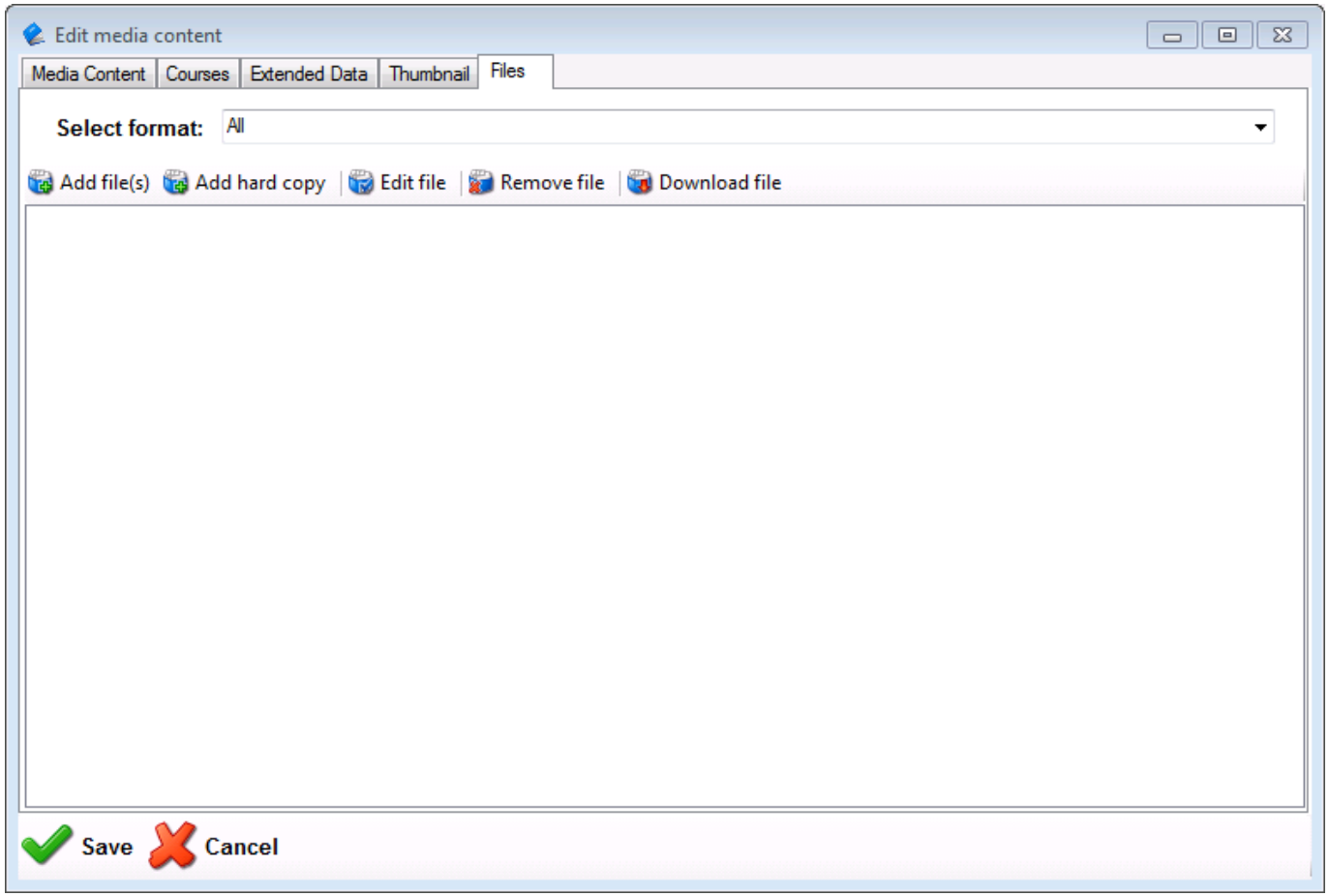
There's different type of extended data. It depends on the Category you've selected for the media content that determines which extended data to be displayed.

Category: Alternate TextBook, AudioFile, VideoFile, and Course Pack

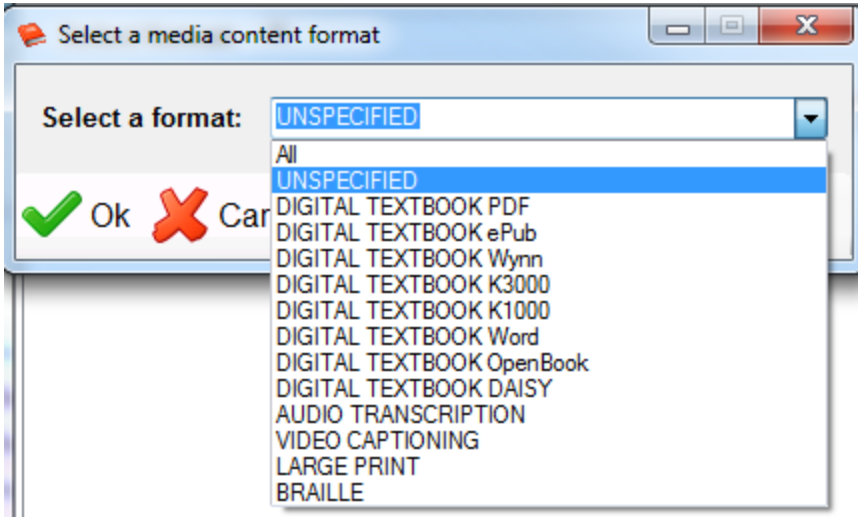


Thumbnail: You can upload your media content's image in here

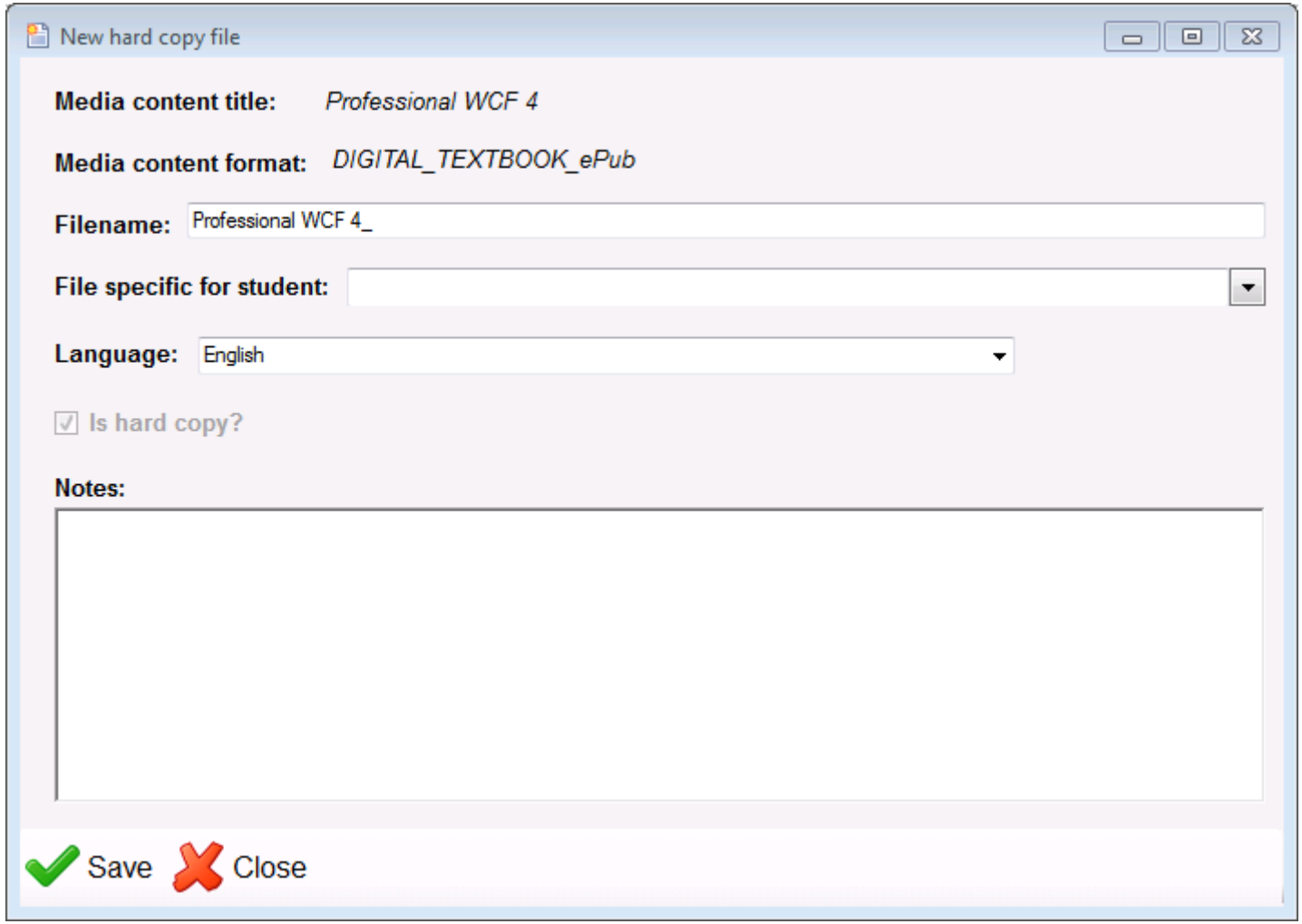
If you scanned a book, the image is automatically added here by ClockWork.



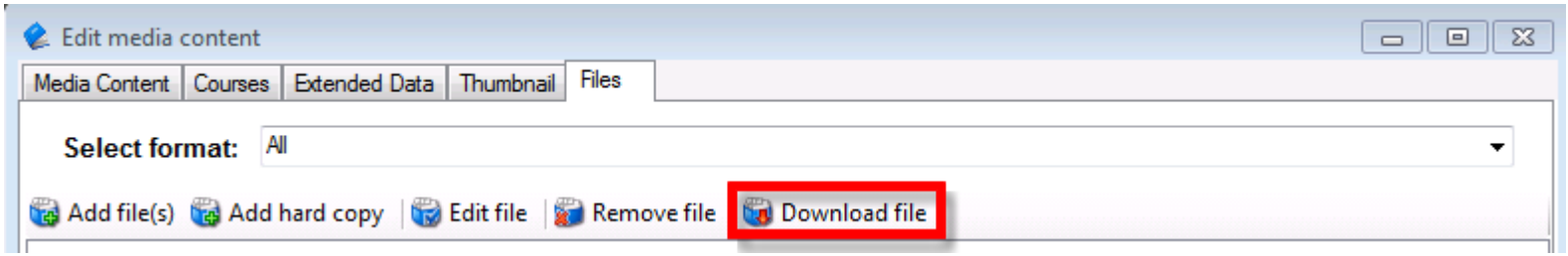
Files: You can upload any files related to that media content



You must first select a media content format for your file. This list cannot be changed. If you wish to add something in this list, please submit a new feature request at https://clockworks.ca/support/Helpdesk/Tickets/New



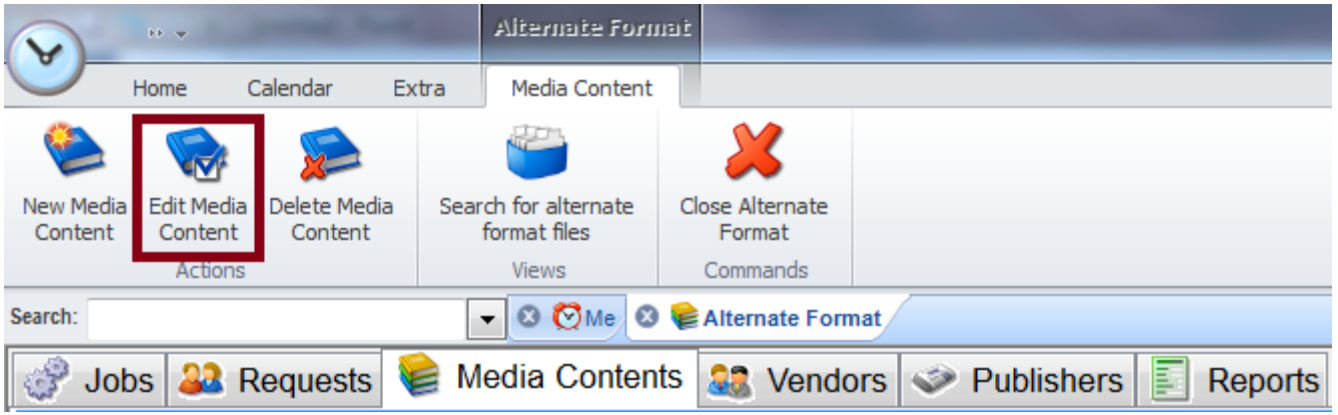
Hard Copy File: Sometimes the publisher gives you a copy of the actual book in Braille or Large Text instead of a media file. Hard Copy file is the actual book.



You can download this file by selecting the media content format, selecting the file, and clicking on “Download file”.

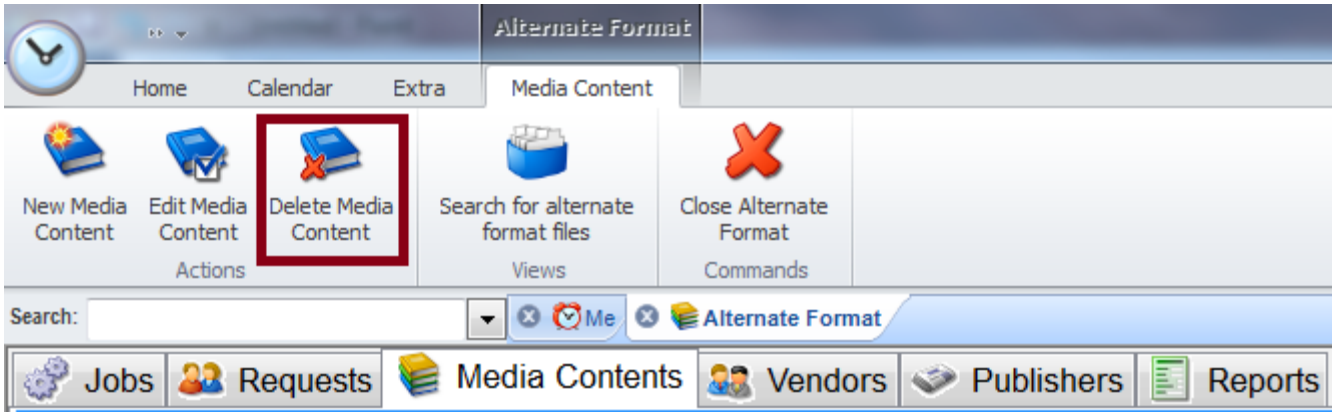
Once you’re done feeling out the Media Content information, press Save.

How to edit Media Content



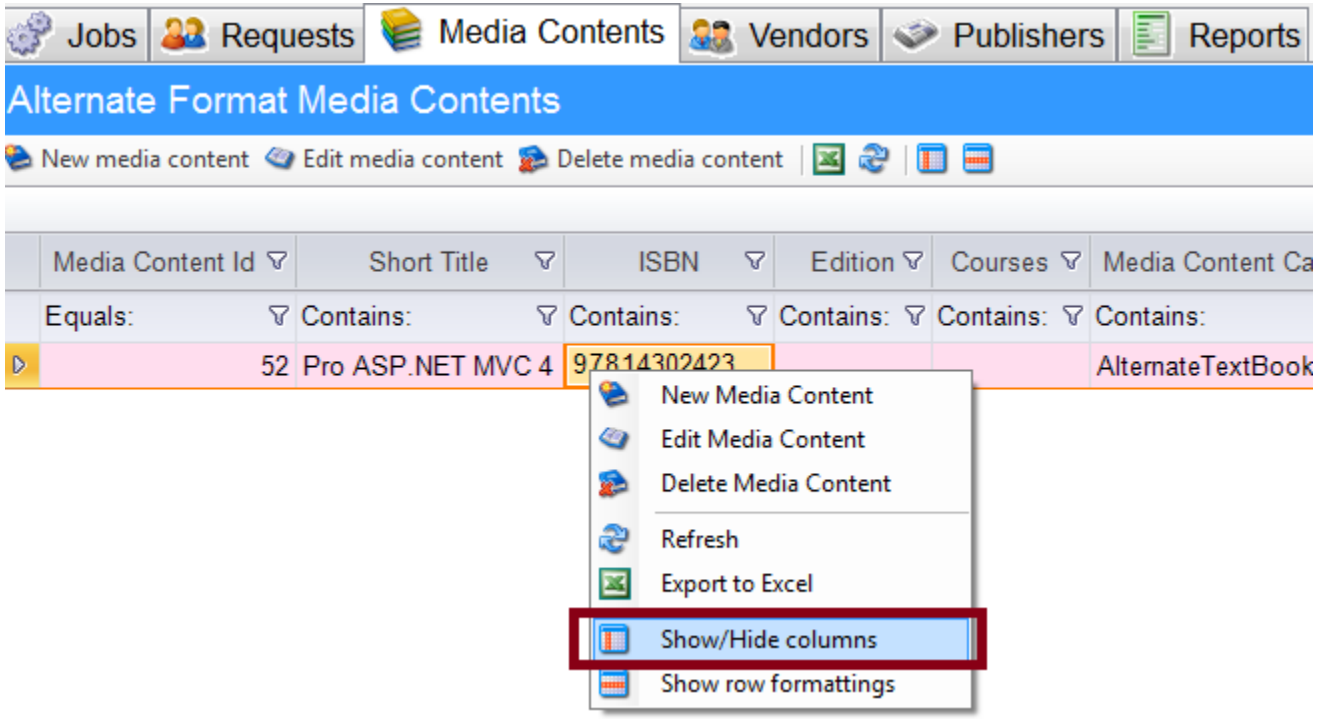
- First, select the Media Contents you want to edit
- Then on the ribbon bar, click on “Edit Media Content”
- You can also right-click and select “Edit Media Content”
- Another option is to double-click on your selected Media Content

How to delete Media Content



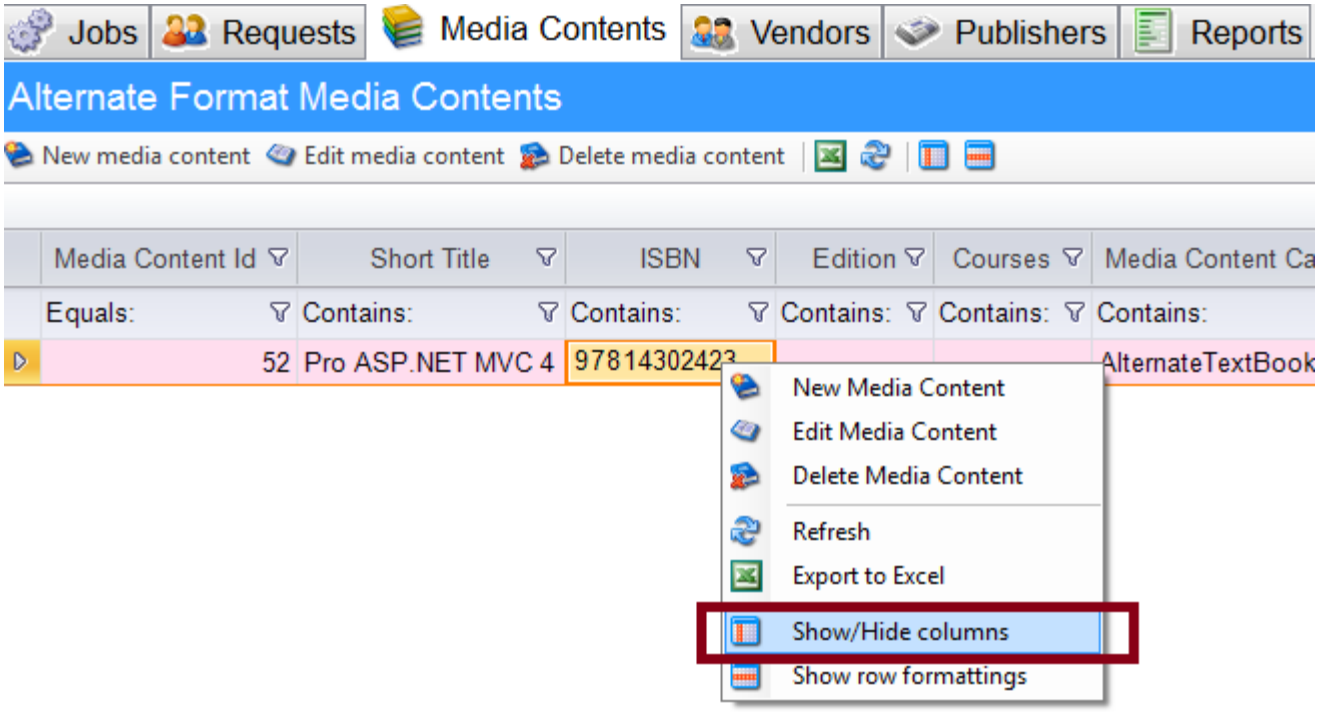
- On the Media Contents tab, select the publisher you want to delete
- There's a button on the ribbon bar that says "Delete Media Content"
- Or you can also, right-click and select "Delete Media Content"

How to export to Excel



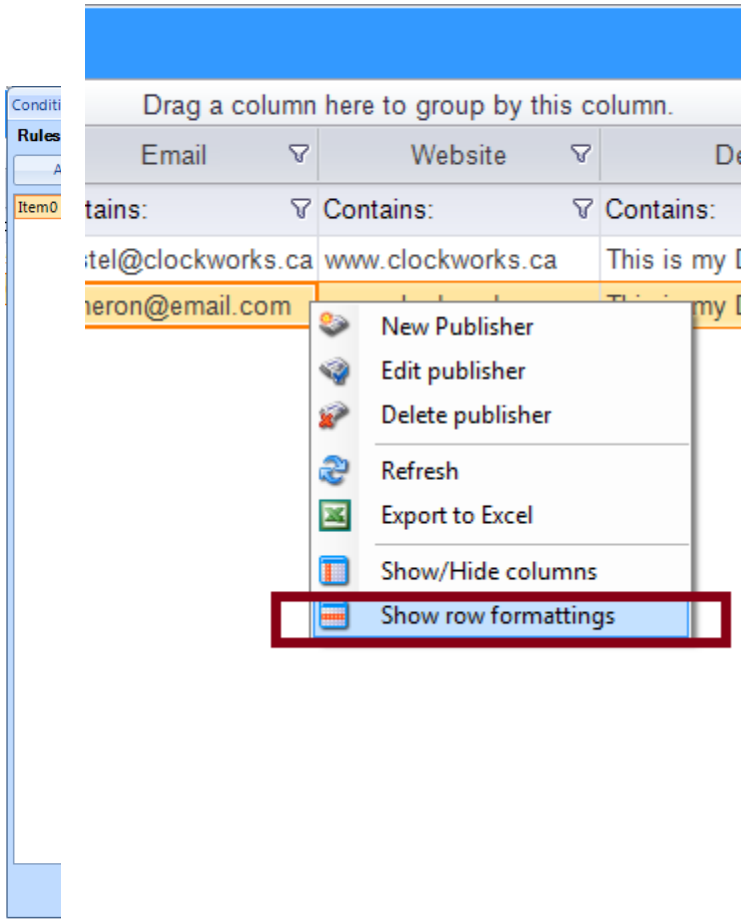
- On the Media Contents tab
- Right-click anywhere on the screen
- Select “Export to Excel”

How to show columns



- On the Media Contents tab, right-click anywhere on the screen
- Select “Show/Hide columns”
- Drag and drop to add or remove columns on the grid

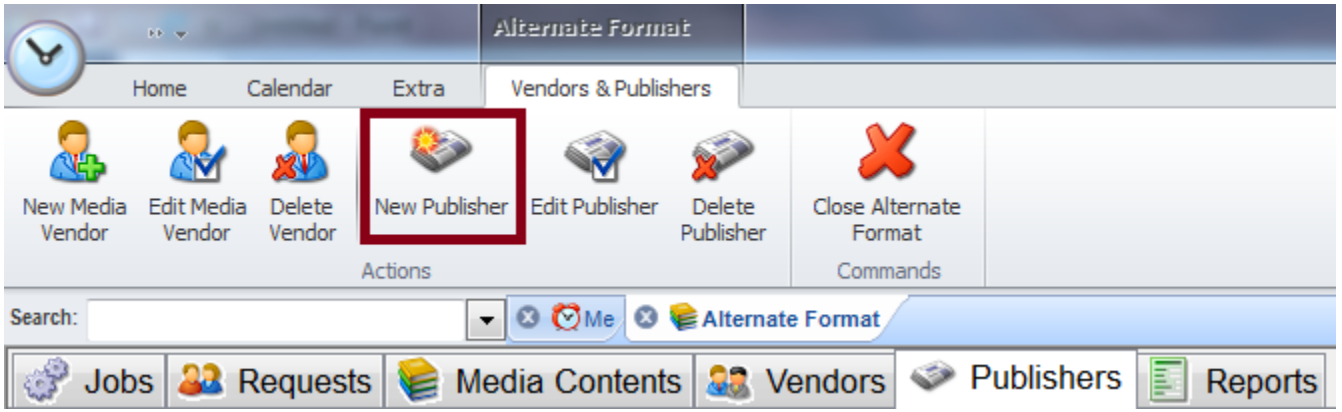
How to add / remove row formatting



- On the Media Contents tab, right-click anywhere on the screen
- Select “Show row formatting”
- Set your format

PUBLISHERS

How to add a Publisher

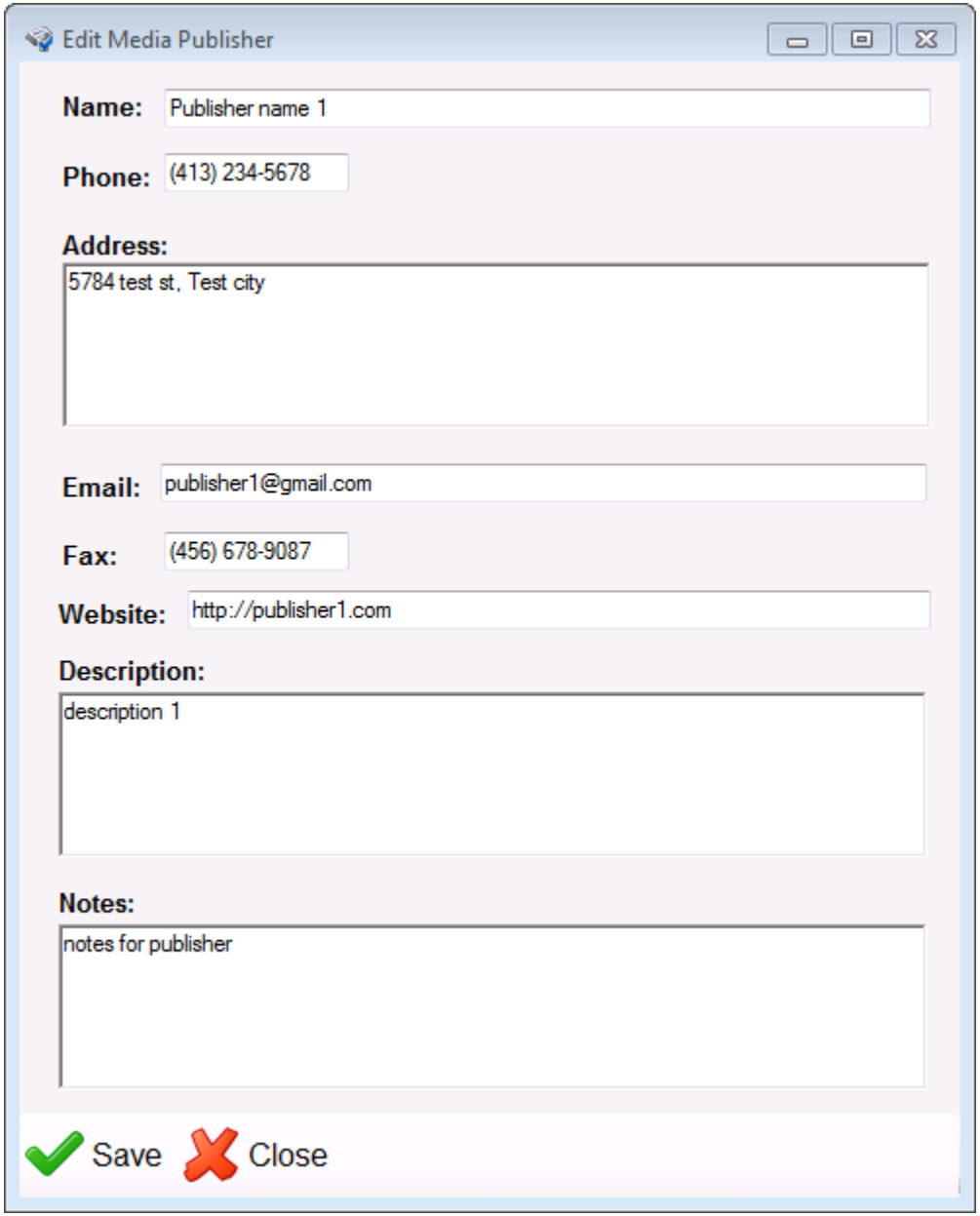


Once you open the Alternate Format module…

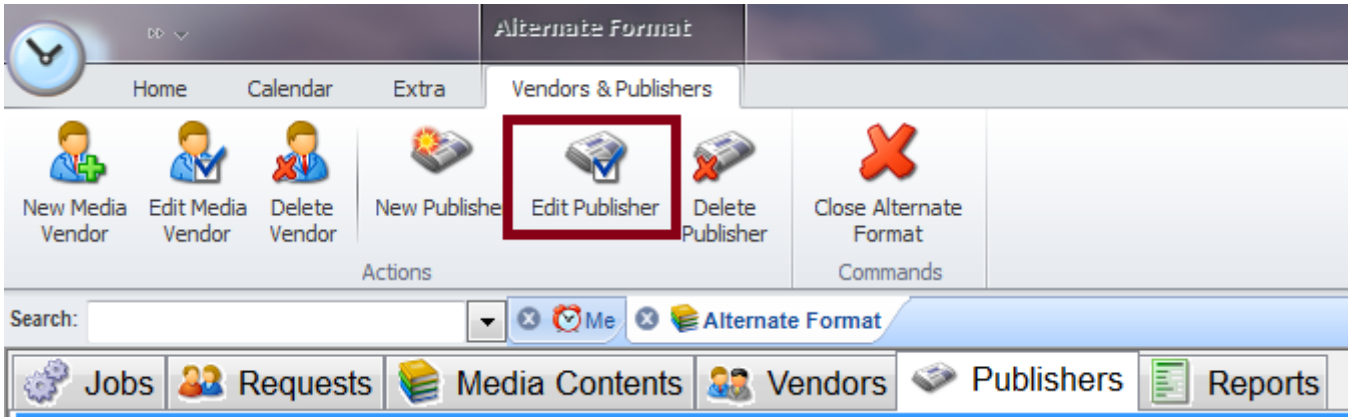
- Click on the Publishers tab
- The ribbon bar should change to Vendors & Publishers
- Click on “New Publisher”
- You can also right-click and select “New Publisher”

You should get a screen like this:

Enter the Publisher's information.

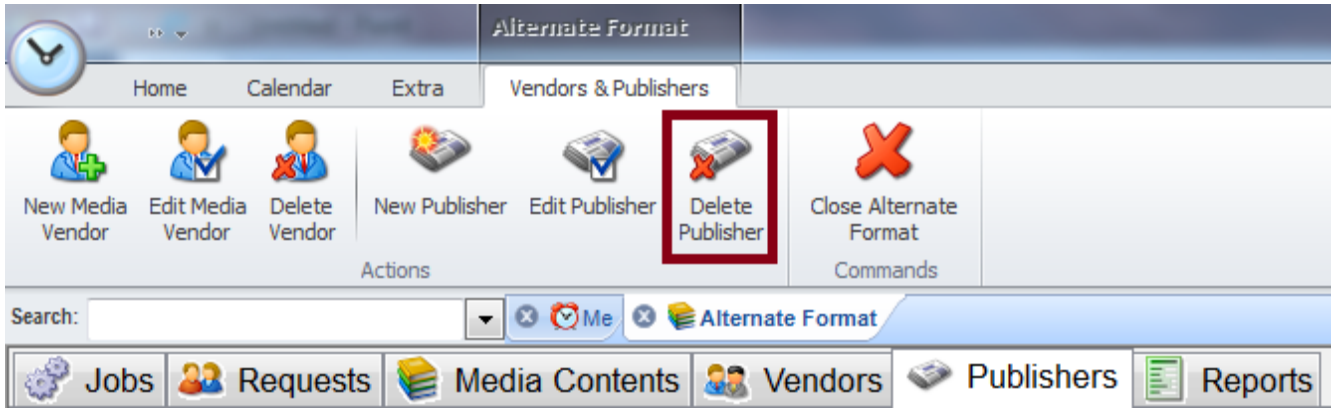


How to edit a Publisher



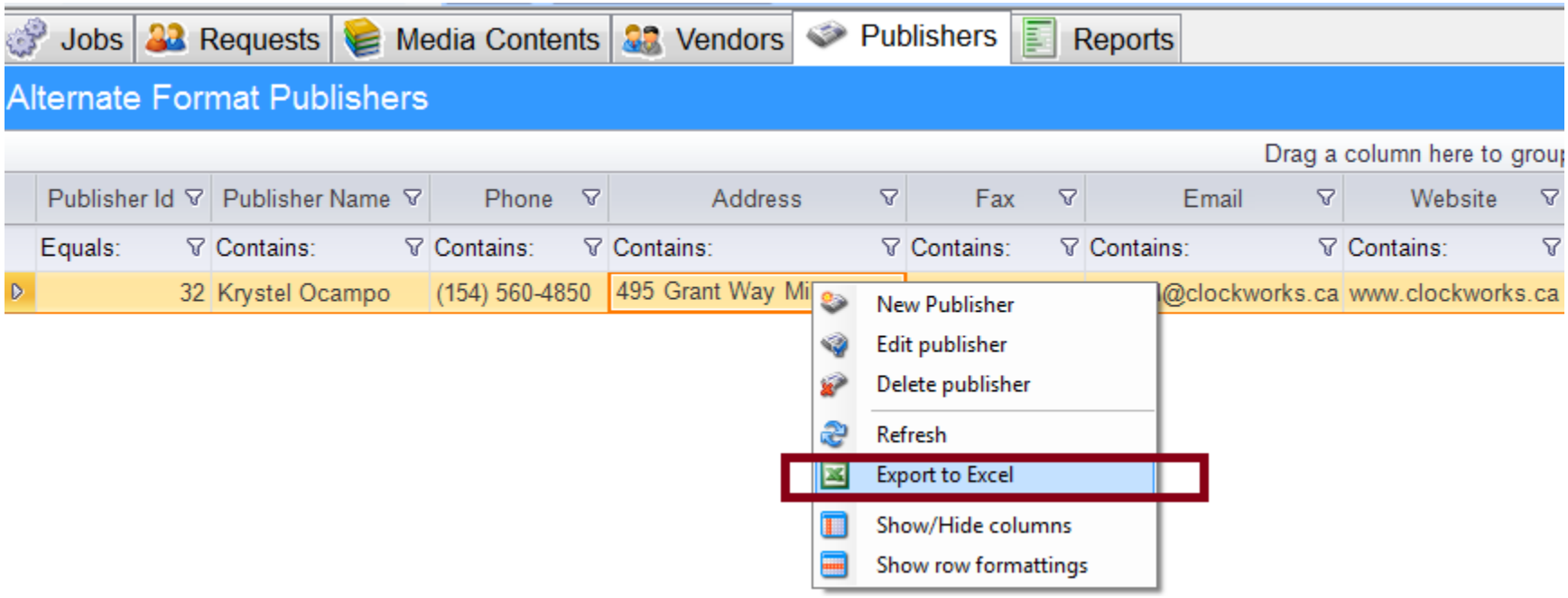
- First, select the Publisher you want to edit
- Then on the ribbon bar, click on “Edit Publisher”
- You can also right-click and select “Edit Publisher”
- Another option is to double-click on your selected Publisher

How to delete a Publisher



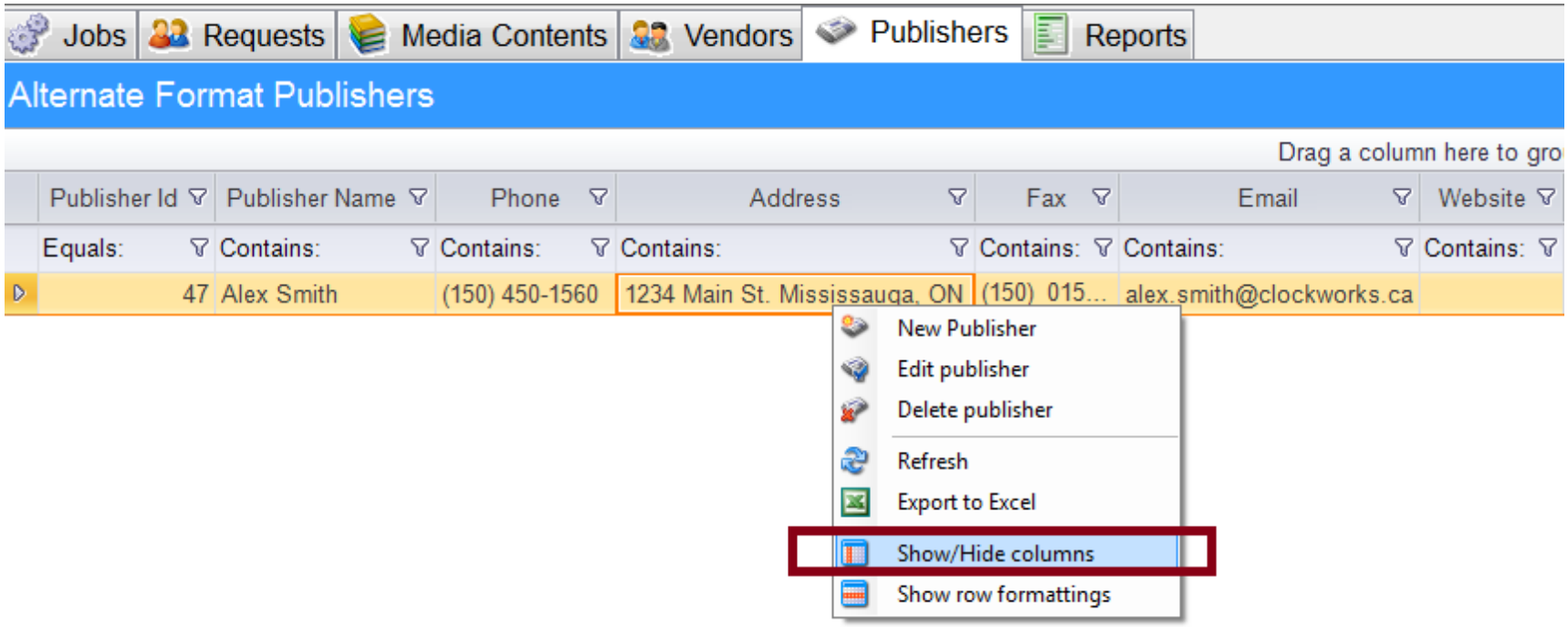
- On the Publishers tab, select the publisher you want to delete
- There's a button on the ribbon bar that says "Delete Publisher"
- Or you can also, right-click and select "Delete Publisher"

How to export to Excel



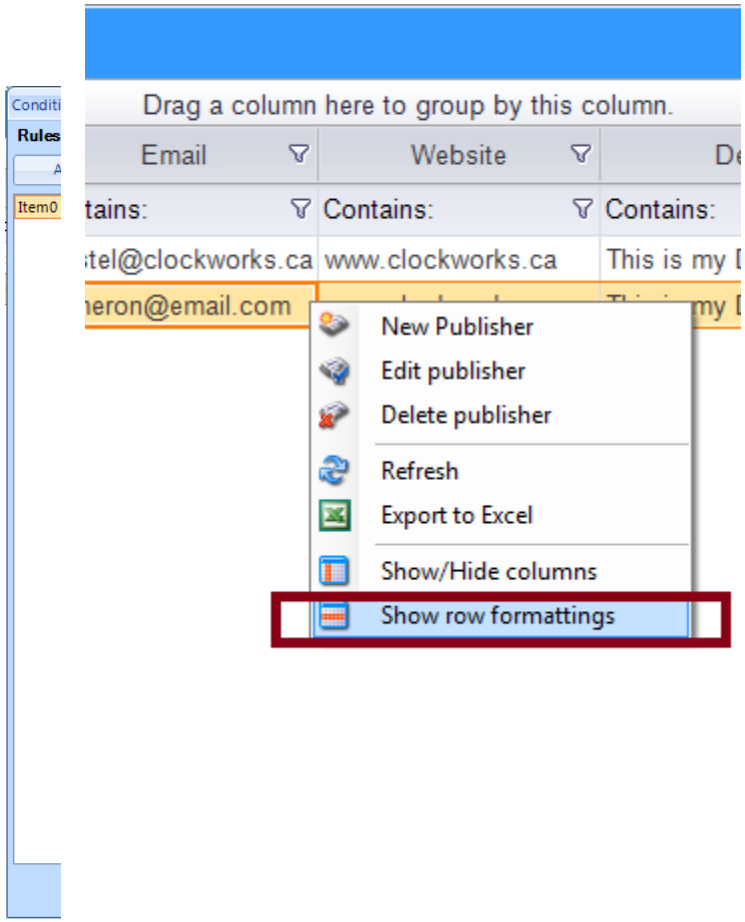
- On the Publisher tab
- Right-click anywhere on the screen
- Select “Export to Excel”

How to show columns



- On the Publishers tab, right-click anywhere on the screen
- Select “Show/Hide columns”
- Drag and drop to add or remove columns on the grid

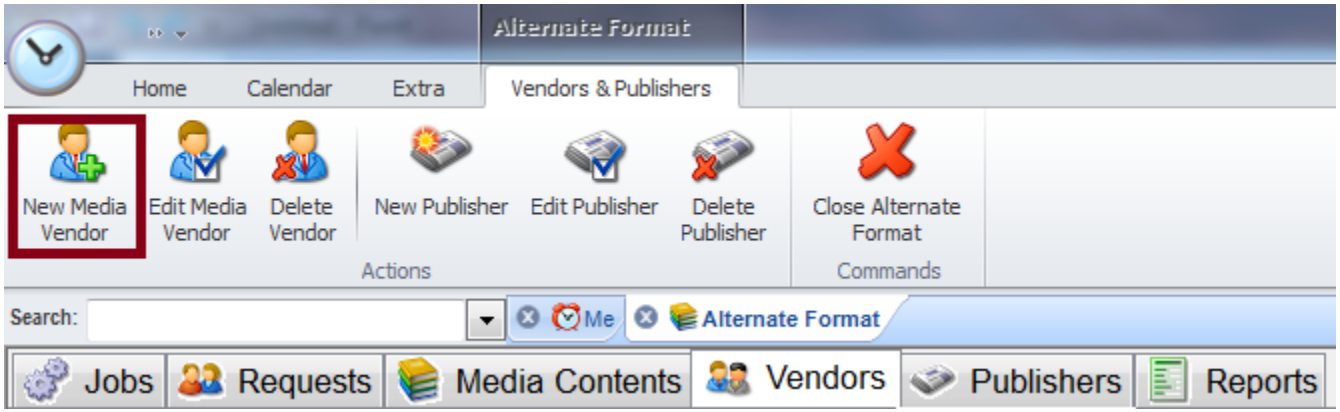
How to add / remove row formatting



- On the Publishers tab, right-click anywhere on the screen
- Select “Show row formatting”
- Set your format

VENDORS

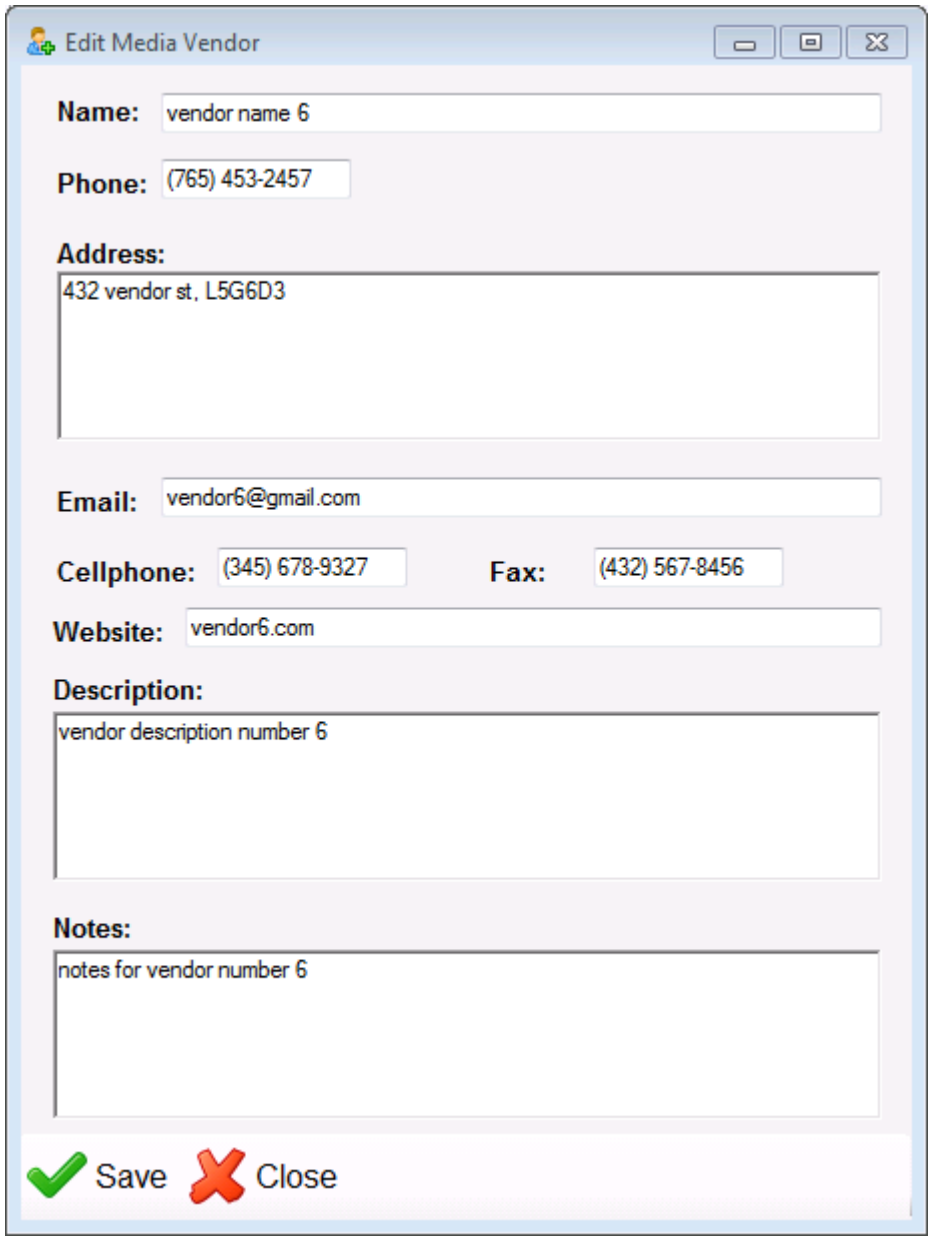
How to add a Vendor



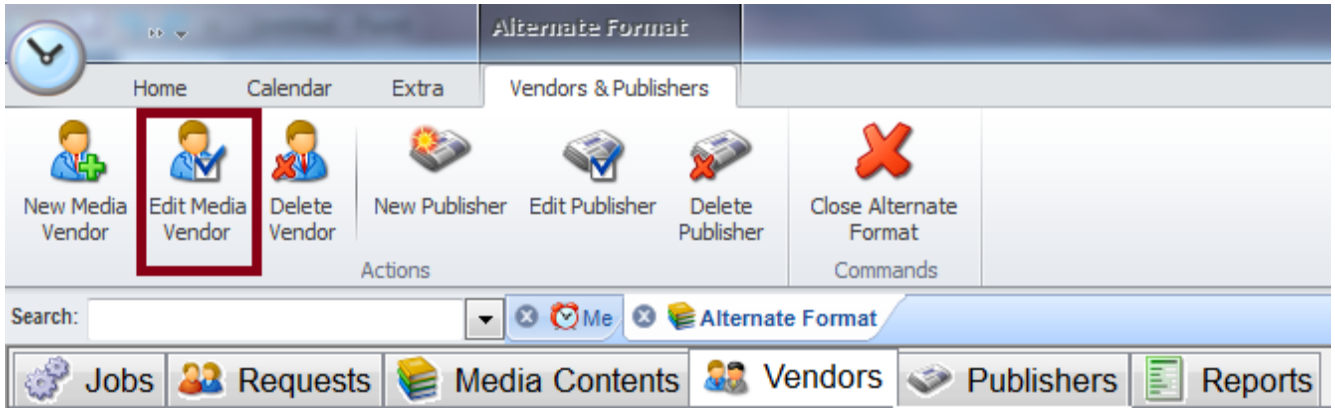
- Click on the Vendors tab
- The ribbon bar should change to Vendors & Publishers
- Click on “New Vendor”
- You can also right-click and select “New Vendor”

You should get a screen like this:

Enter the Vendor's information.

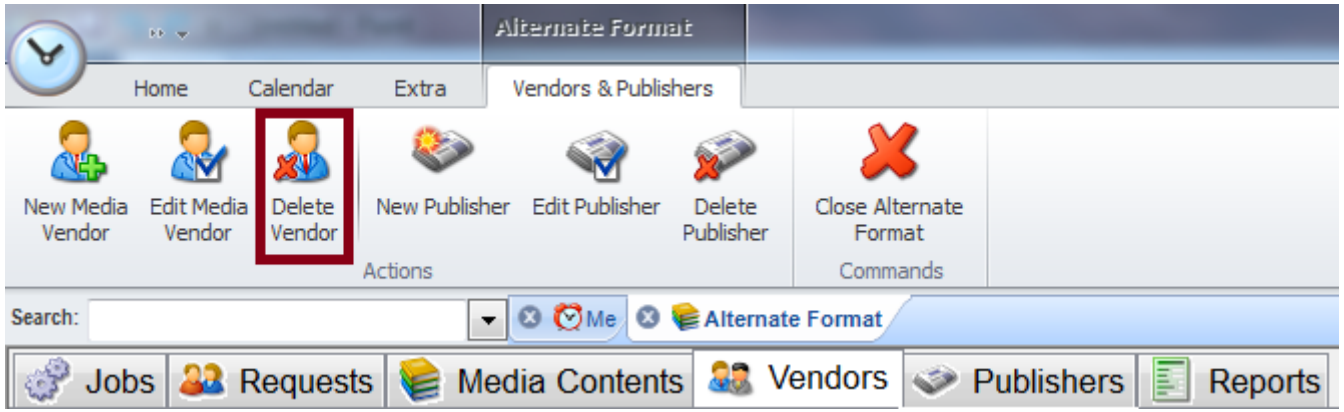


How to edit a Vendor



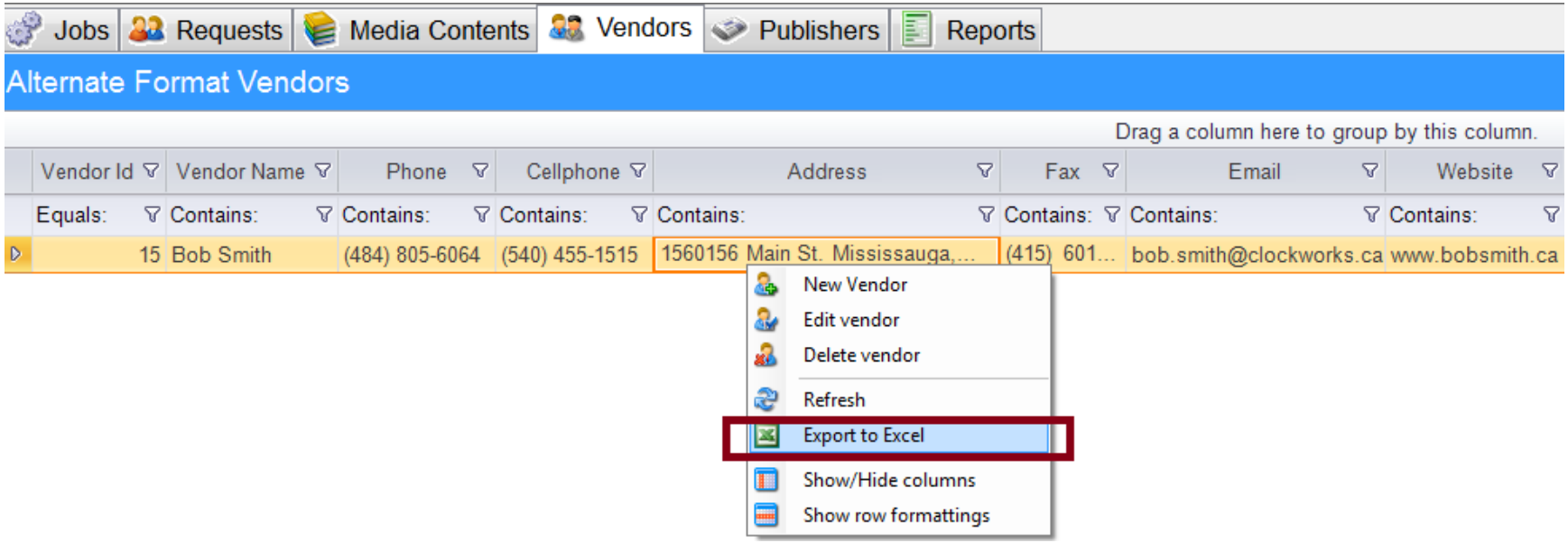
- First, select the vendor you want to edit
- Then on the ribbon bar, click on “Edit Vendor”
- You can also right-click and select “Edit Vendor”
- Another option is to double-click on your selected Vendor

How to delete a Vendor



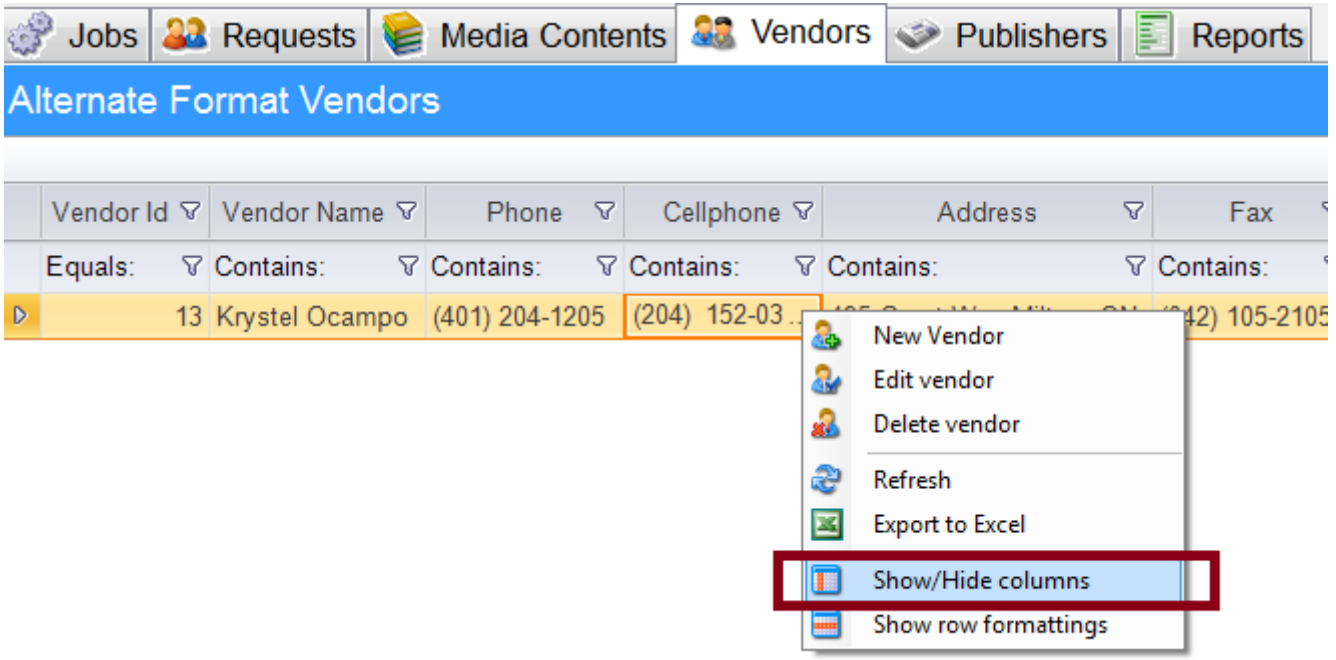
- On the Vendors tab, select the vendor you want to delete
- There's a button on the ribbon bar that says "Delete Vendor"
- Or you can also, right-click and select "Delete Vendor"

How to export to Excel



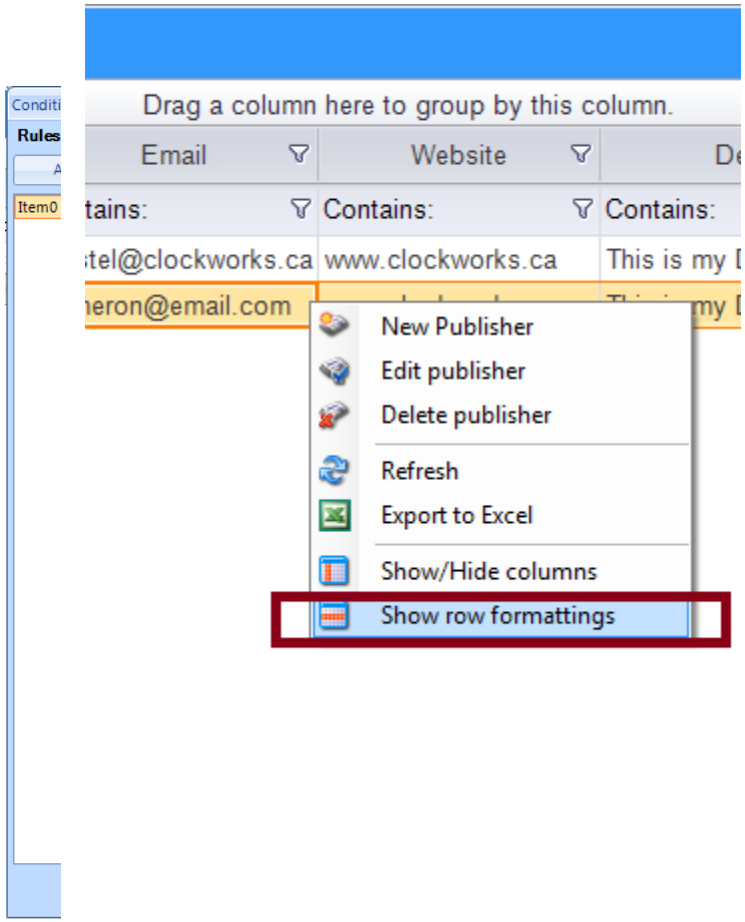
- On the Vendors tab
- Right-click anywhere on the screen
- Select “Export to Excel”

How to show columns



- On the Vendors tab, right-click anywhere on the screen
- Select “Show/Hide columns”
- Drag and drop to add or remove columns on the grid

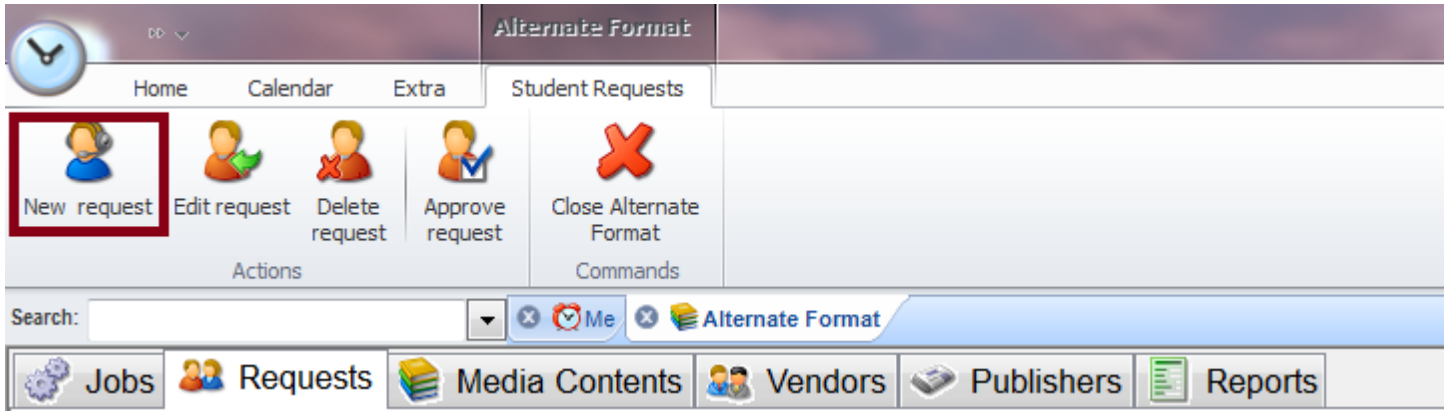
How to add / remove row formatting



- On the Vendors tab, right-click anywhere on the screen
- Select “Show row formatting”
- Set your format

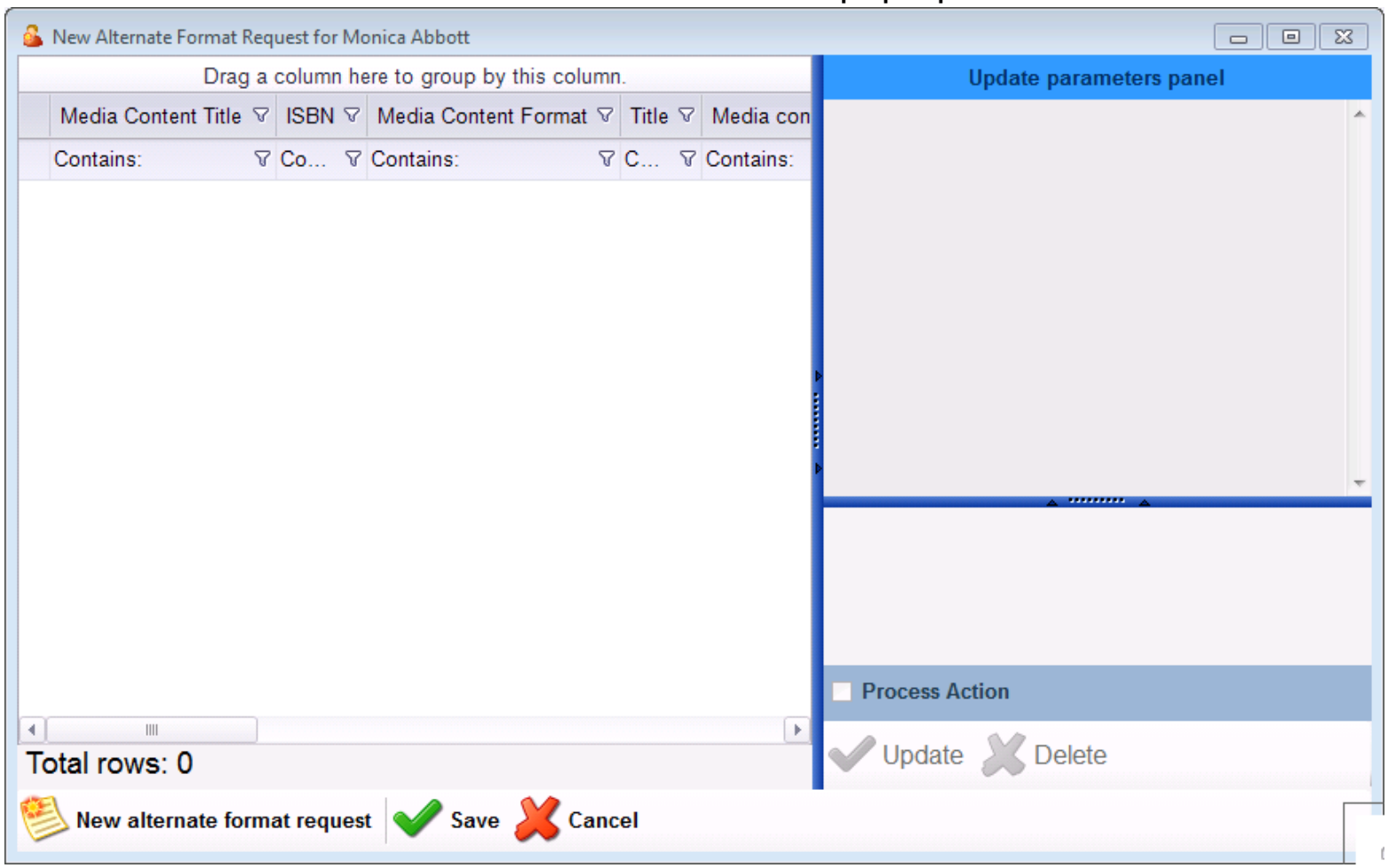
REQUESTS

How to create a new Request

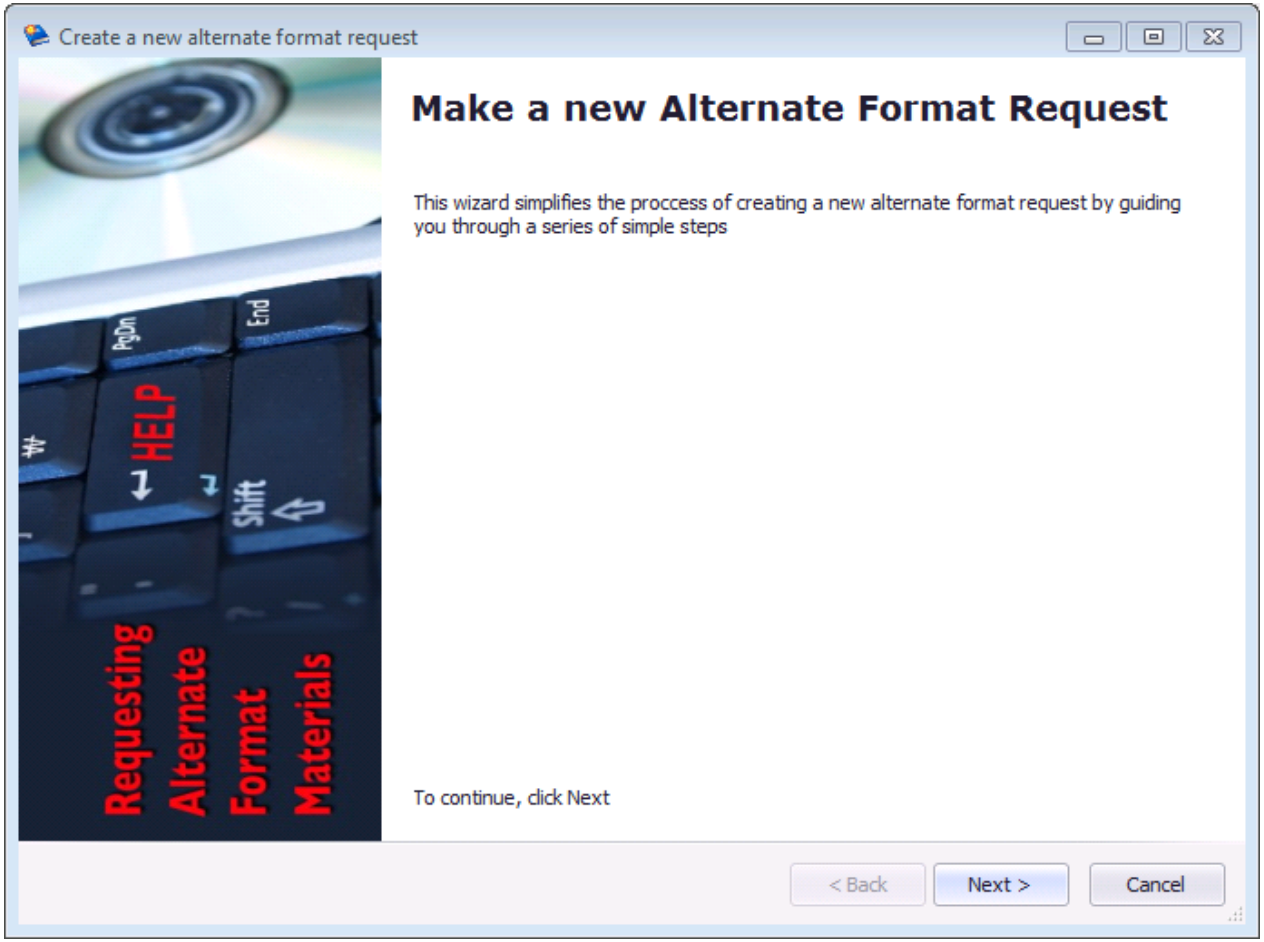


1. Click on the Requests tab
2. The ribbon bar should change to Student Requests
3. First, select an active student by going to the search bar
4. Click on New Request

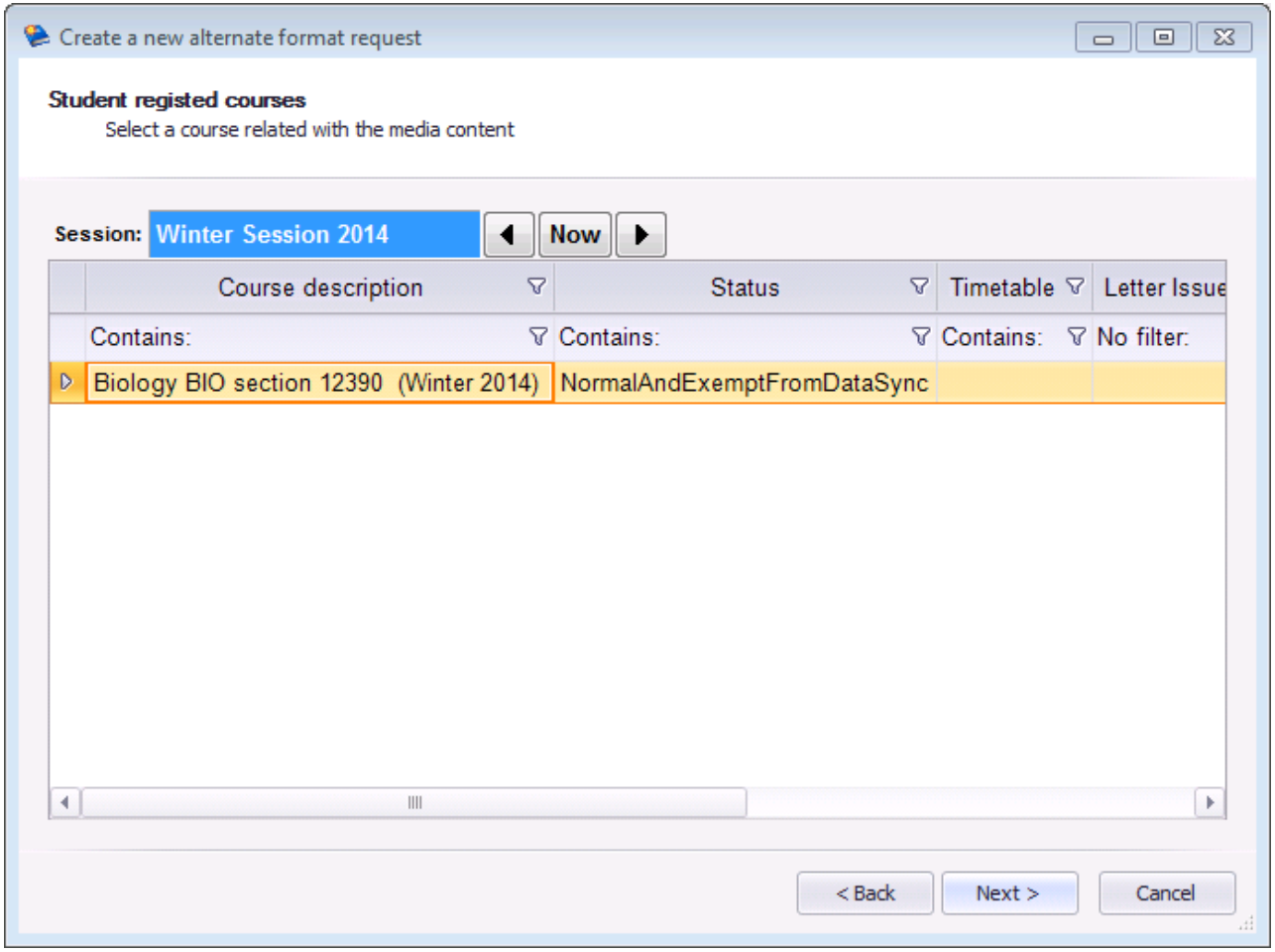
A screen like this should pop-up.



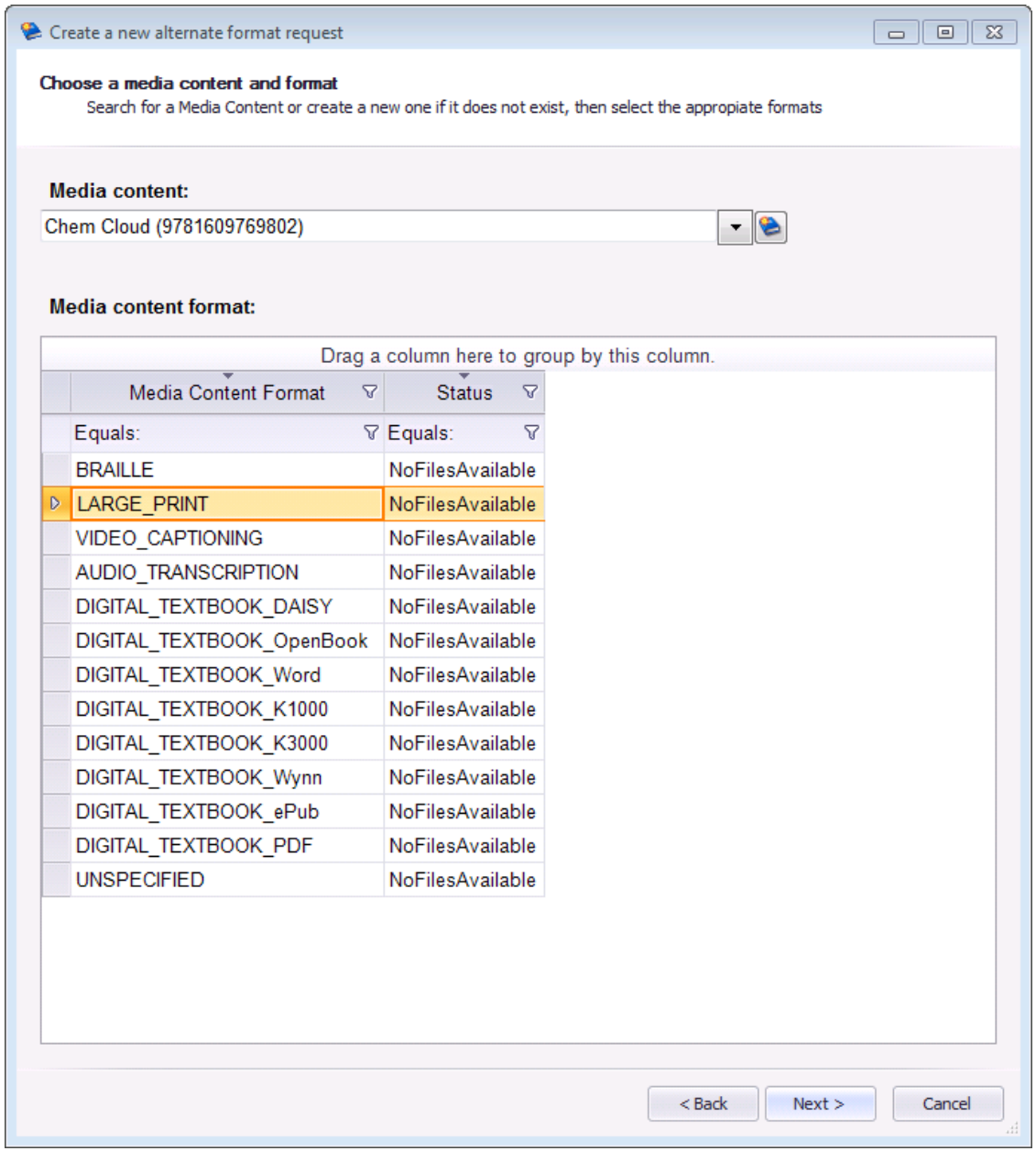
Click on “New alternate format request” at the bottom left side.


Create a new alternate format request
Make a new Alternate Format Request
This wizard simplifies the proccess of creating a new alternate format request by guiding you through a series of simple steps
To continue, click Next
< Back
Next >
Cancel
Requesting Alternate Format Materials

Click Next



Courses are linked to a student's account in ClockWork. If courses are not displayed that means the student does not have current active courses.

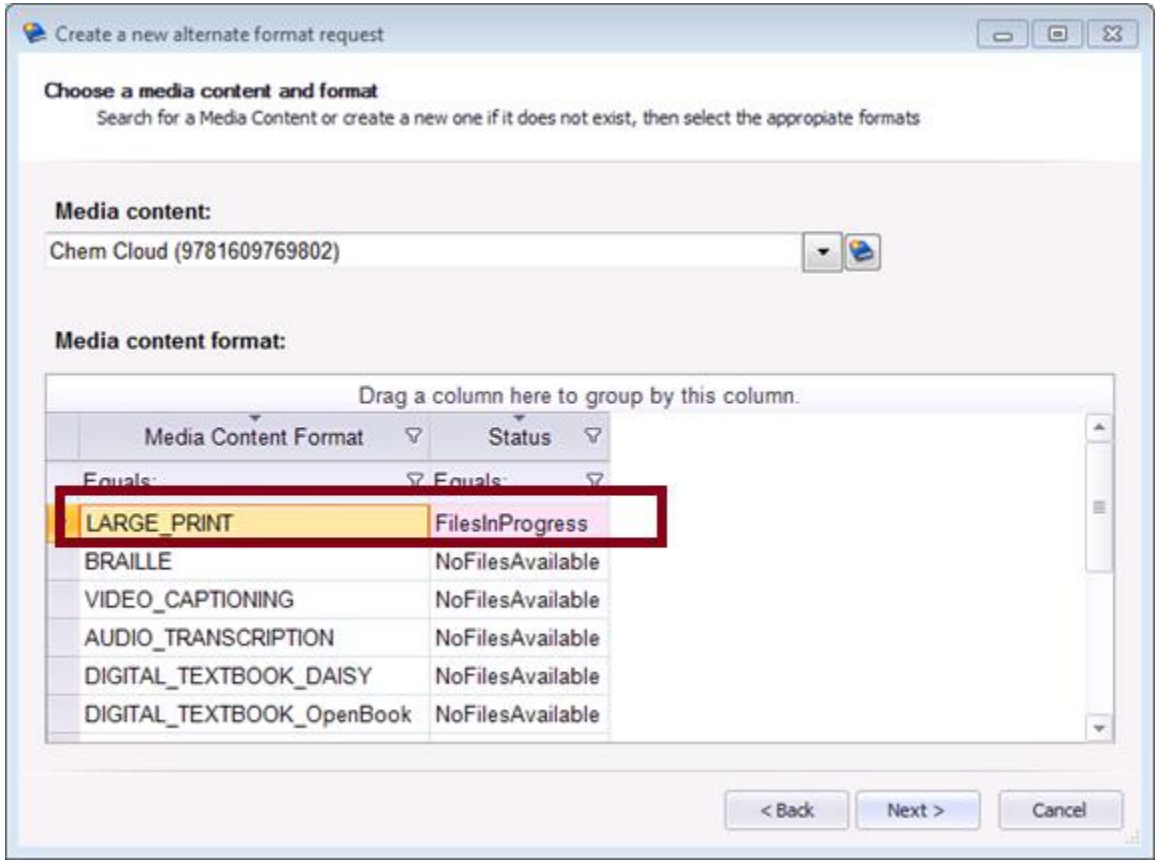


- **Step 1:** Search for the media content

- You can also add new media content by clicking on the button with book icon in it

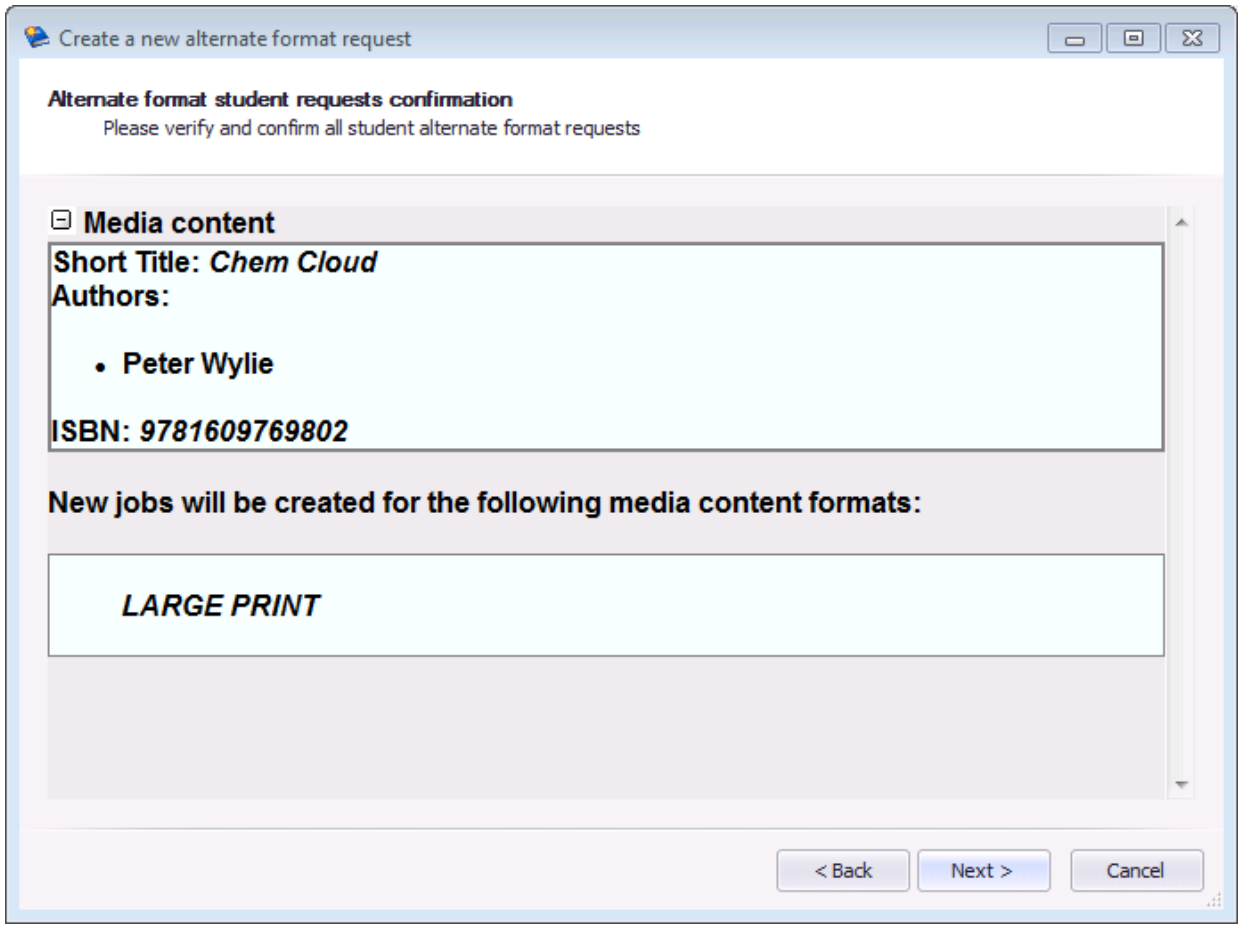
- **Step 2:** Select the media content format you wish to request

- **Step 3:** Click Next

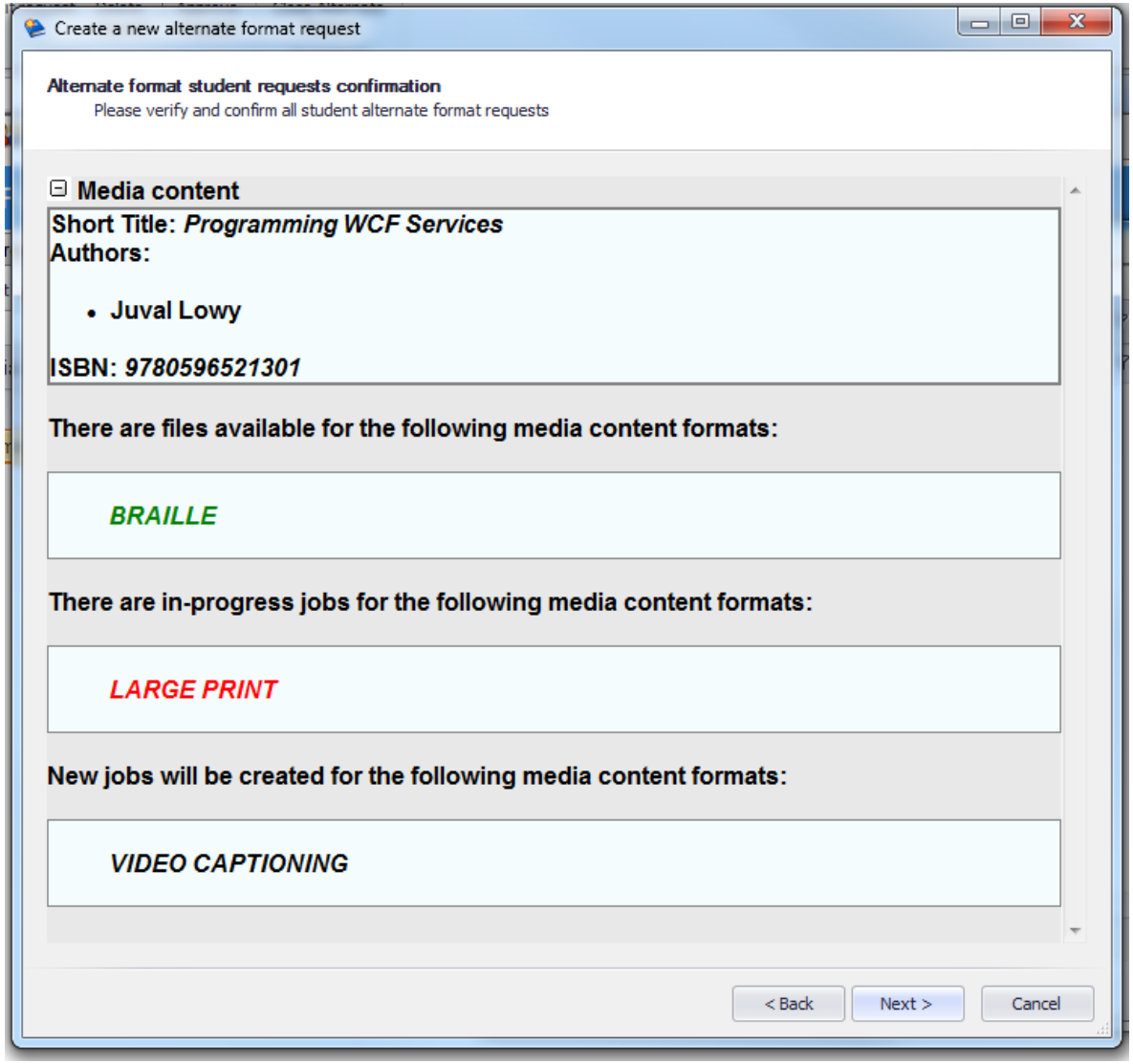


If the Media Content Format is in “FilesInProgress” that means that the media content is already in the Jobs.

Scroll down to Jobs section to learn more about it. See page



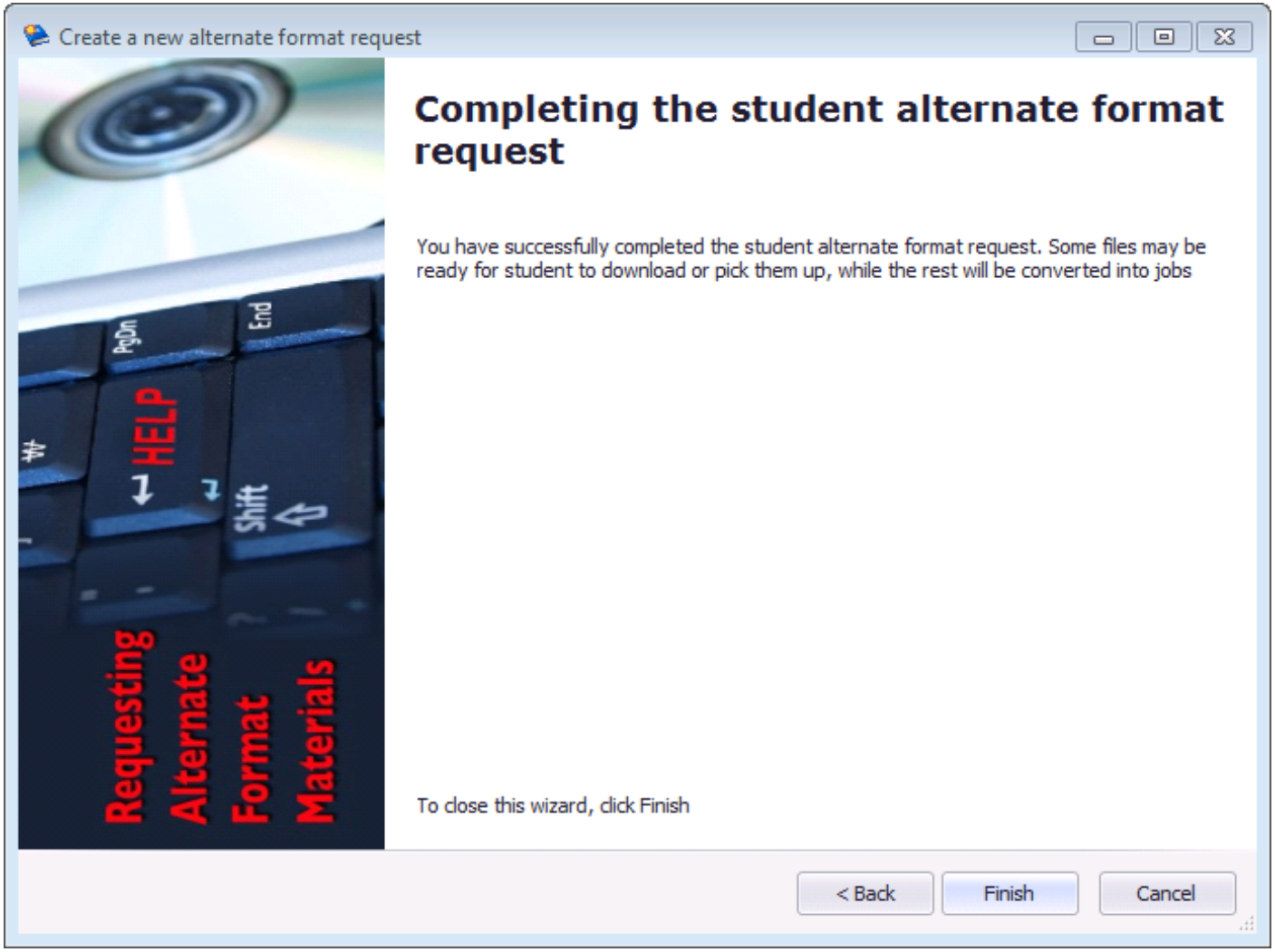
This displays the summary of your request.



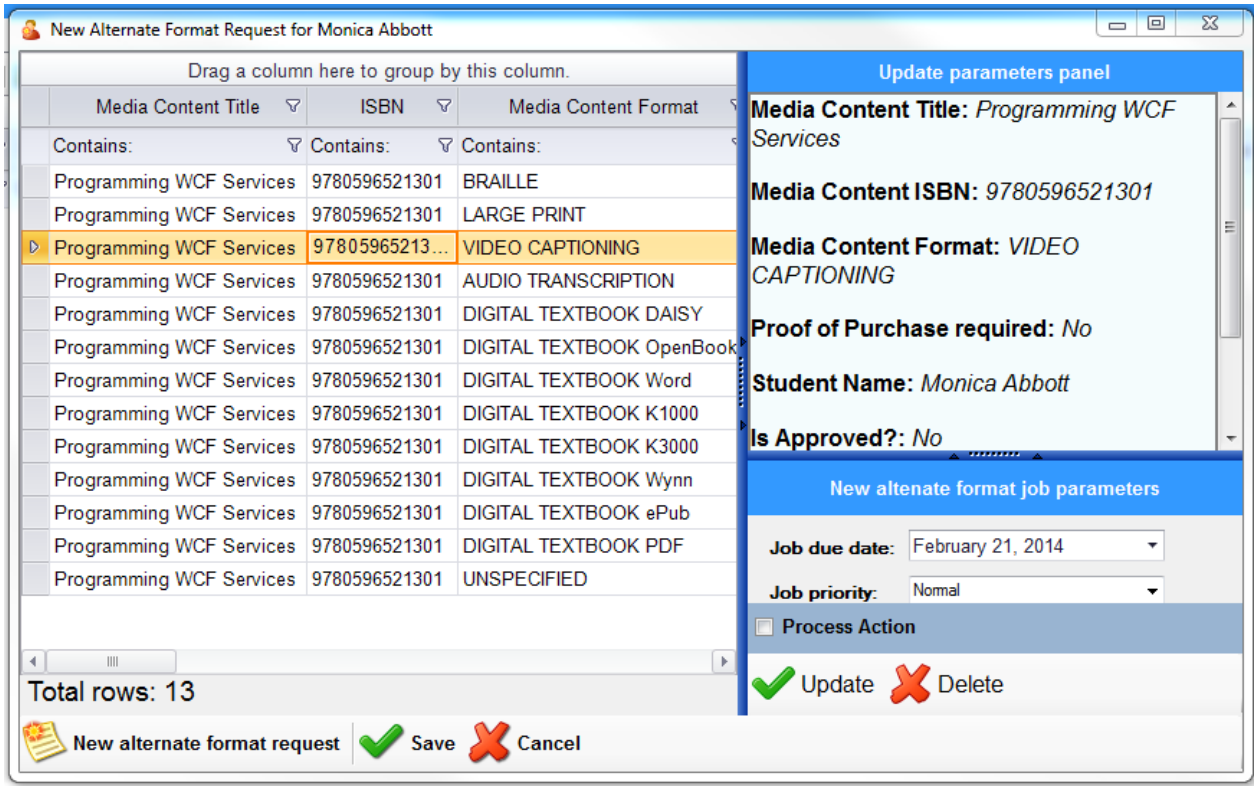
Green:
It means that the media file format is completed and available to download.

Red:
It means that the media file format is already in the jobs and in-progress. But its not ready for download.

Black:
It means that it still needs to create a job for the media file format.



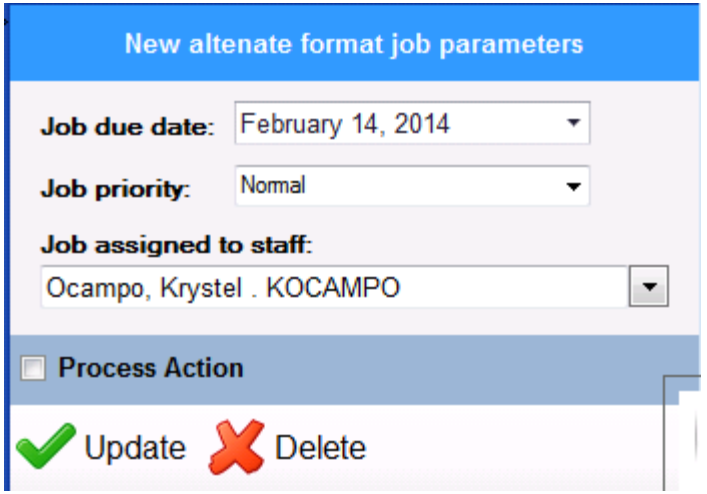
Click Finish

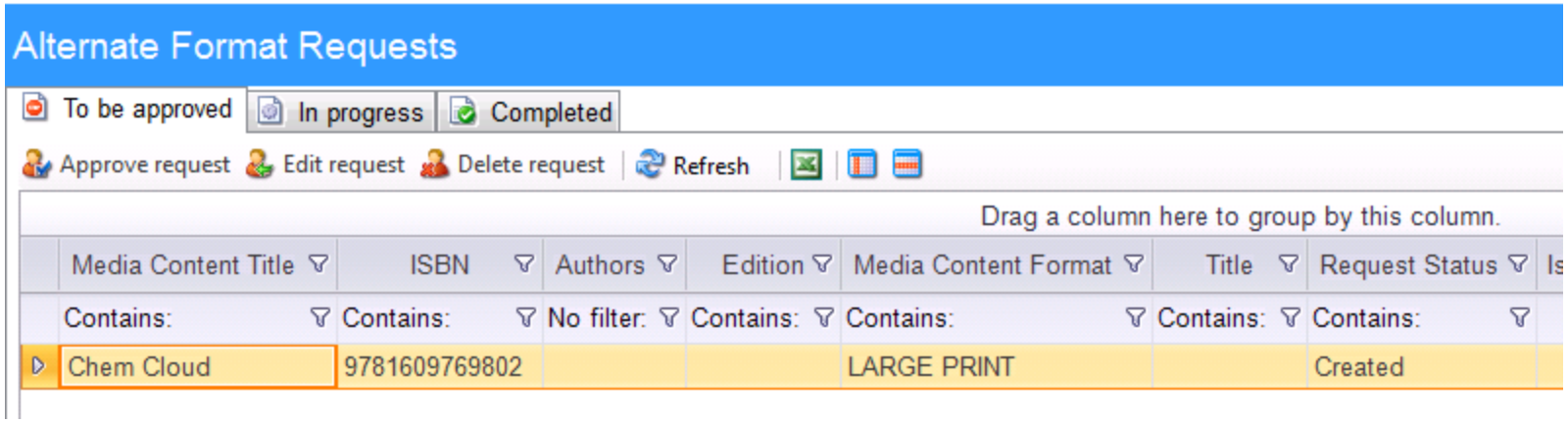


- It should bring you back to this screen with all the media content format that you've selected.

On the same screen, at the bottom-right, there's this section for the job parameters. This is for each Media Content that's been requested.

Process Action: If its checked, the job will be automatically be approved and go to the Job list. If it's not, it's going to stay in the request section where it needs to be approved.

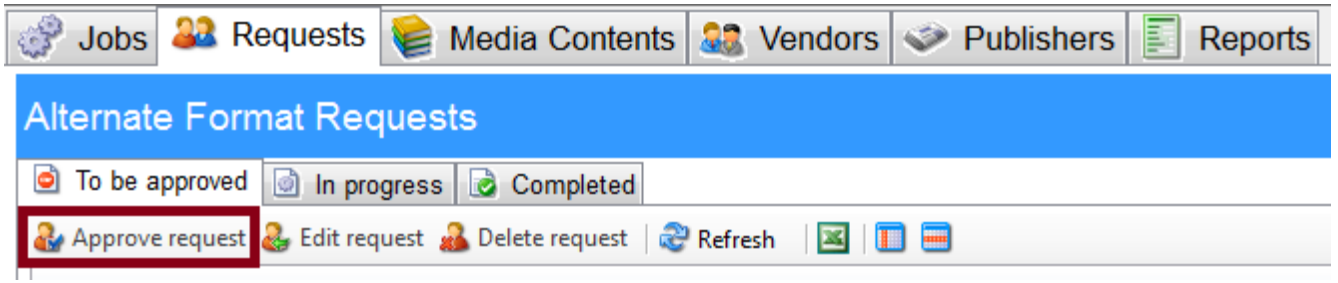




To be approved: The staff needs to approve the request that was just created. If the Process Action wasn't checked.

Currently, we don't have web portion for Alt Format. But when the student makes a request, they will go under Request – Needs to be approved section. This is because the student might request for an alt format that's not related to the course. So just to be sure the staffed needs to approve it.

To be approved: How to approve a Request



Step 1: Go to the Requests tab

Step 2: Under the Requests tab, there's another three tabs. Go to "To be approved".

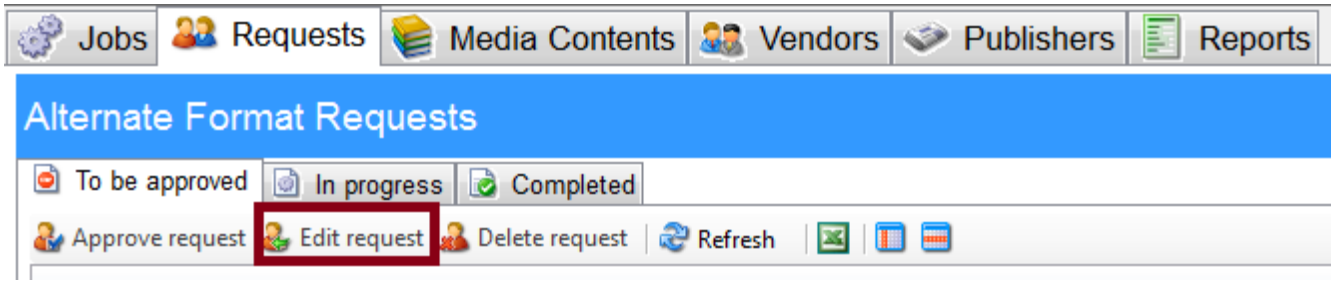
Step 3: Select the request that you want to approved

Step 4: Clicked on "Approved request". See photo.

There's also a button on the ribbon bar called "Approve Request"

Or you can also, right-click and select "Approve Request"

To be approved: How to edit a request



Step 1: Go to the Requests tab

Step 2: Under the Requests tab, there's another three tabs. Go to "To be approved'.

Step 3: Select the request that you want to approved

Step 4: Clicked on "Edit request". See photo.

You may also double-click on a request to edit it.

There's also a button on the ribbon bar called "Edit Request"

Or you can also, right-click and select "Edit Request"

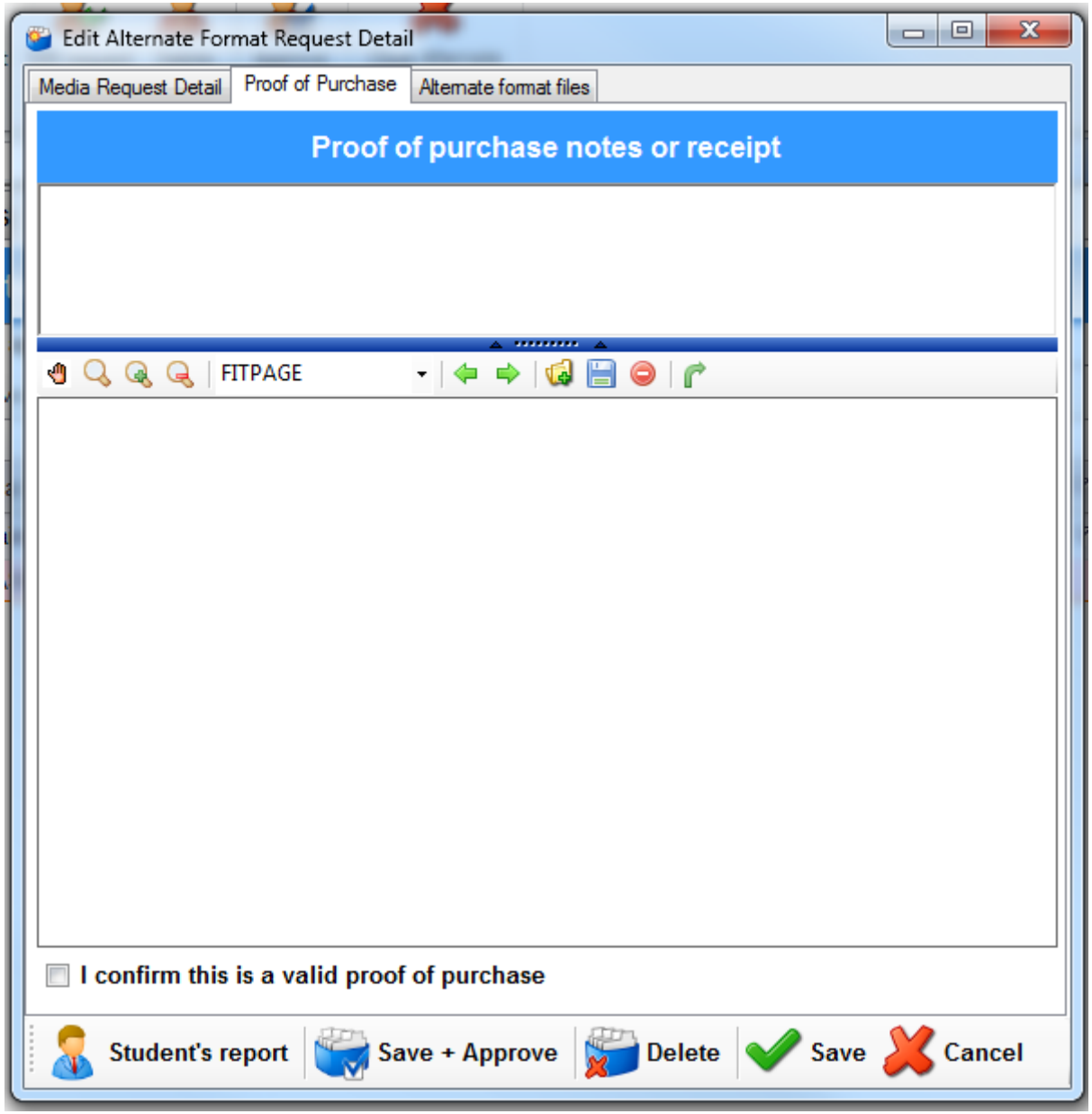
When you edit you get a pop-up box like this…

Media Request Detail

This screen will give you the summary about the job. And you can also, add the start date and end date for it.

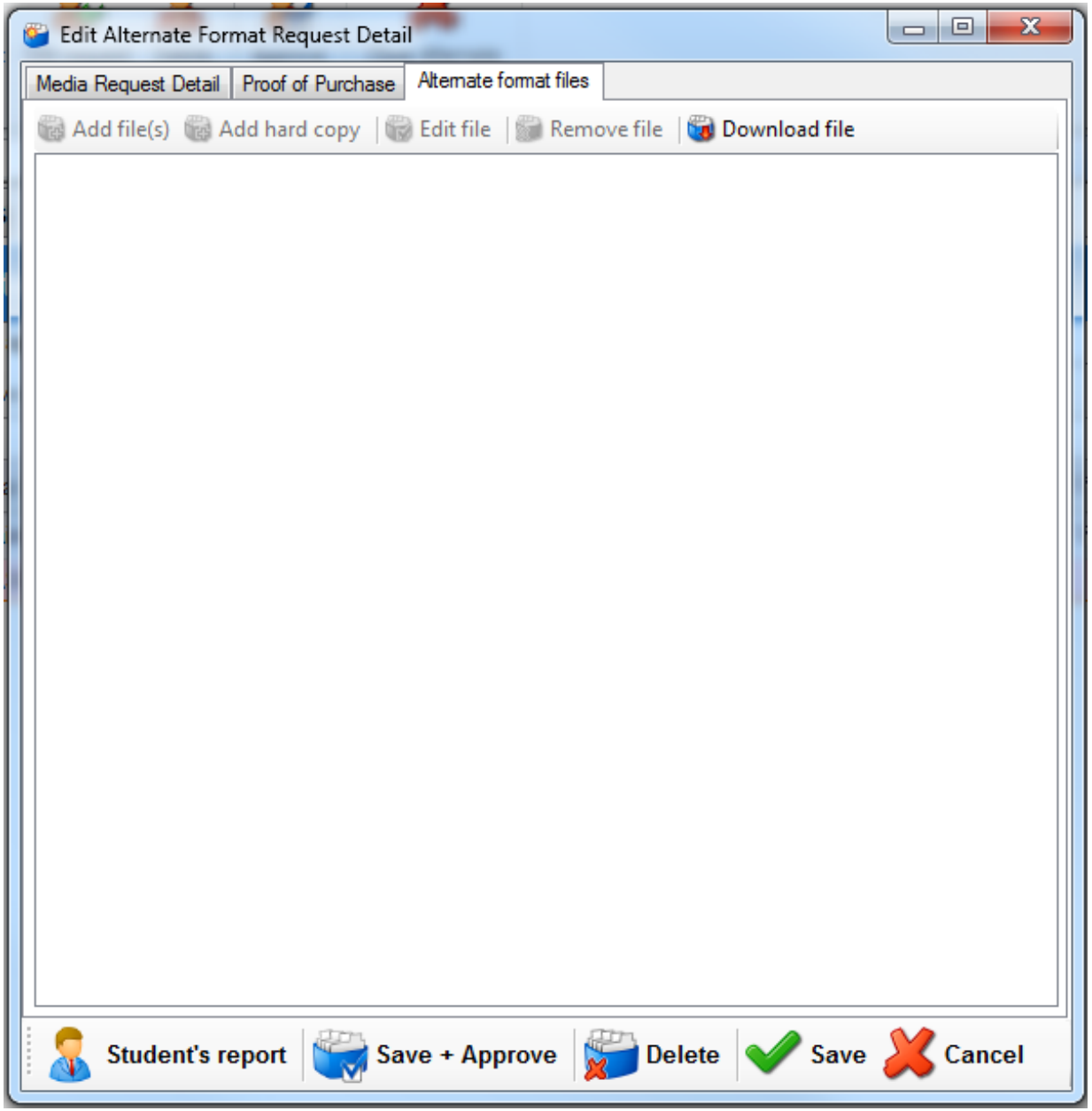
Available start date:

Available end date:



Proof of Purchase

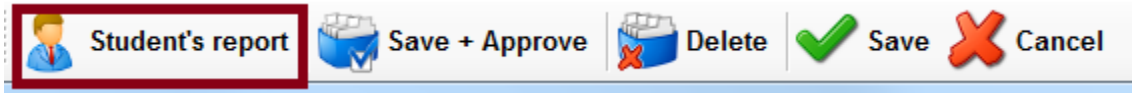
This is where you can attach the proof of purchase and notes. You must confirm it by clicking on the checkbox below.



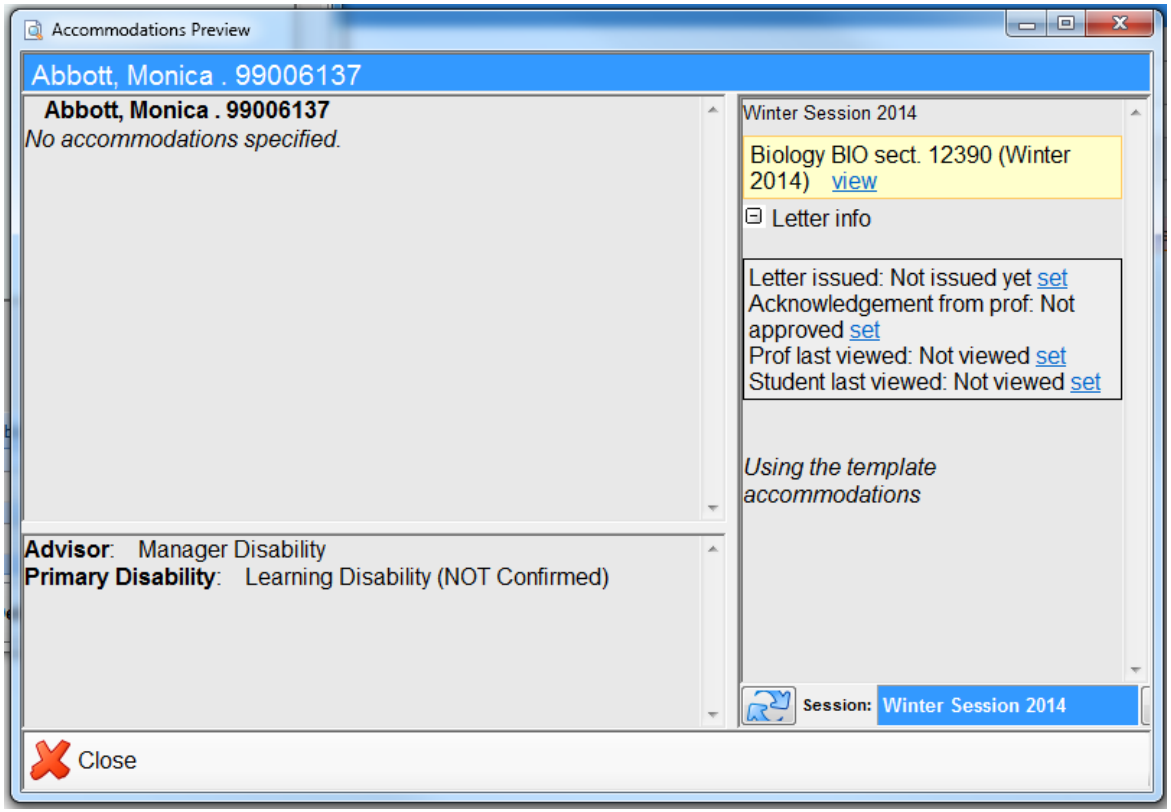
Alternate format files

This is where you can add the media files or the hard copy. You can also download the file.

At the bottom, you have a button called Student's report

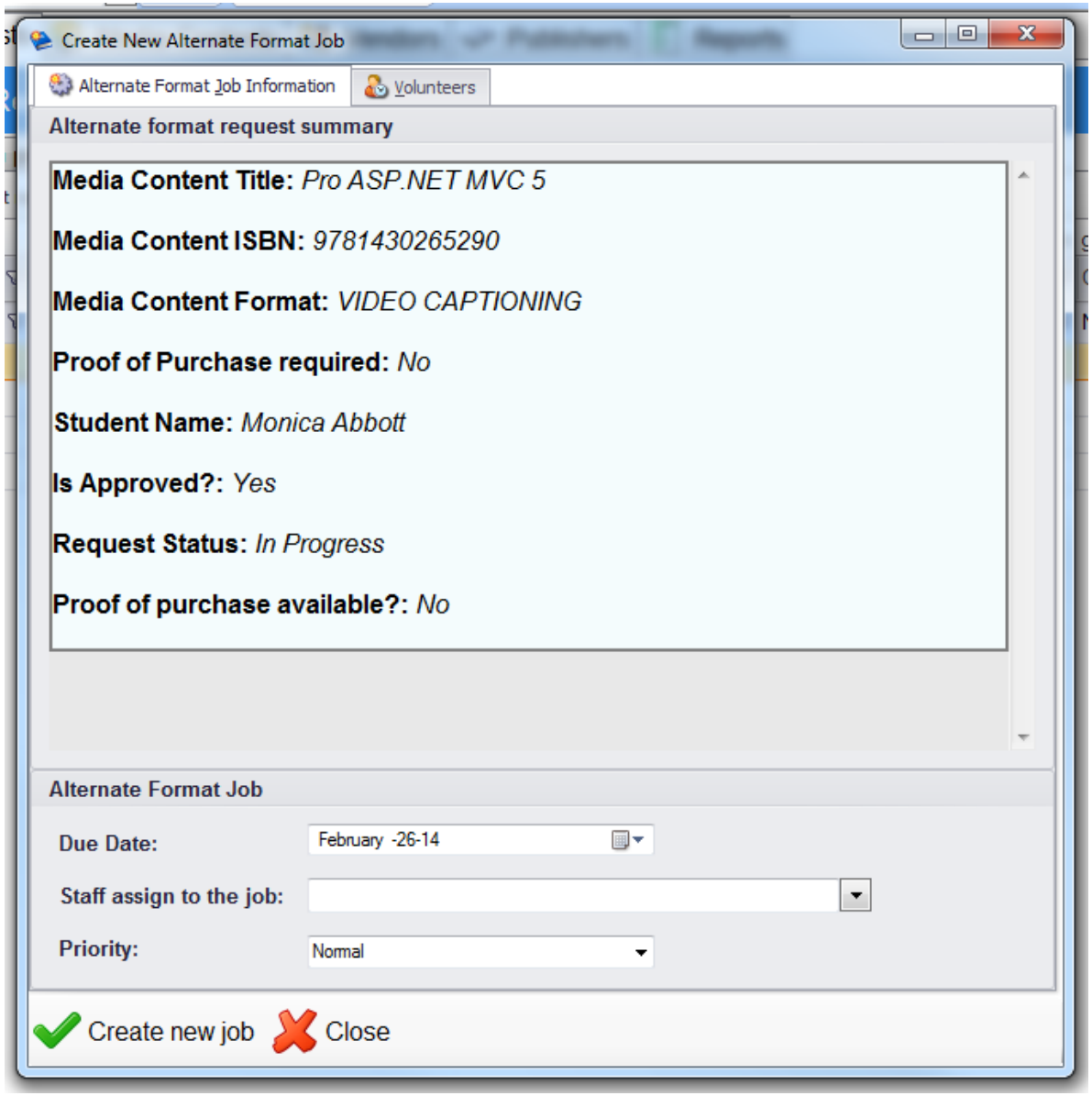


This just displays the information about the Student:



At the bottom, you have a button called Save and Approve

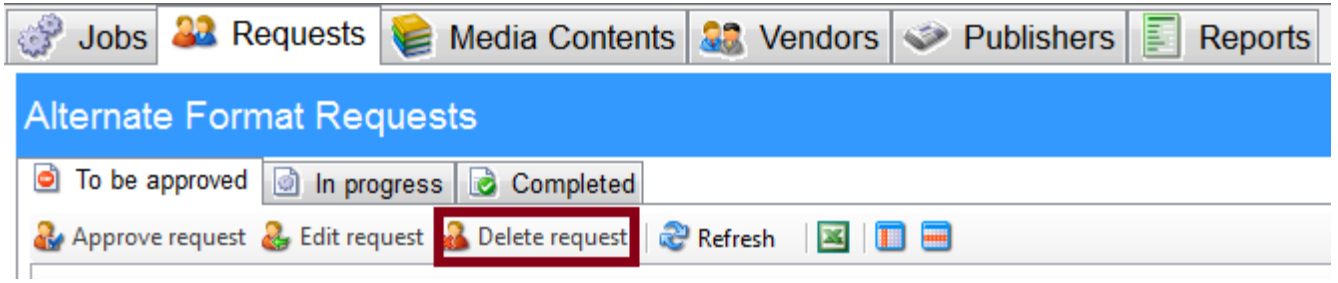
This button let's you save the changes you made and approve the request right away.



You should get a screen like this when you Save and Approve.

Enter the proper due date and assignee at the bottom, and then press Create new job.

To be approved: How to delete a request



Step 1: Go to the Requests tab

Step 2: Under the Requests tab, there's another three tabs. Go to "To be approved".

Step 3: Select the request that you want to approved

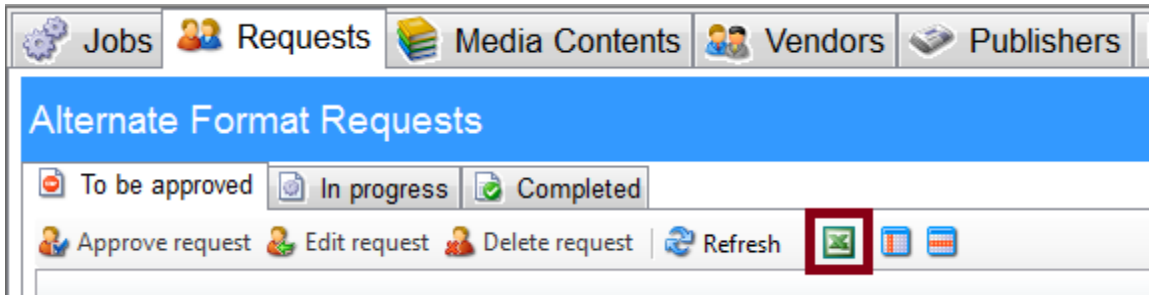
Step 4: Clicked on "Delete request". See photo.

You may also edit the request, and at the bottom, there's an option to the request.

There's also a button on the ribbon bar called "Delete Request"

Or you can also, right-click and select "Delete Request"

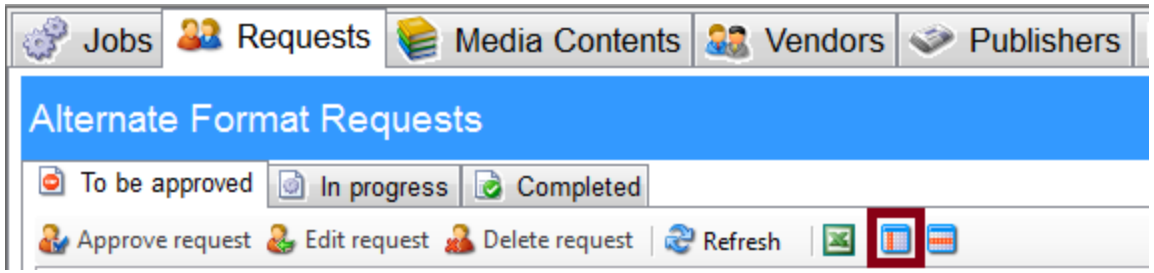
To be approved: How to export the request list to Excel



- On the Requests tab
- Under the “To be approved” tab
- Click on the Excel Sheet button
- See photo

You can also, right-click and select “Export to Excel”

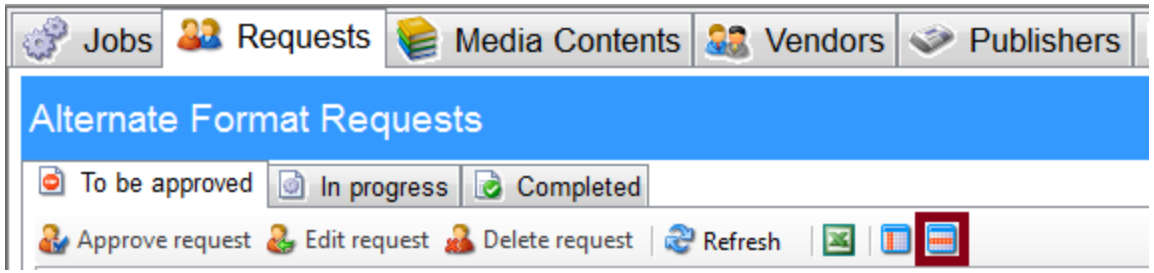
To be approved: How to show columns



- On the Requests tab
- Under the “To be approved” tab
- Click on the button beside the Excel Sheet button
- See photo

You can also, right-click and select “Show/Hide Columns”

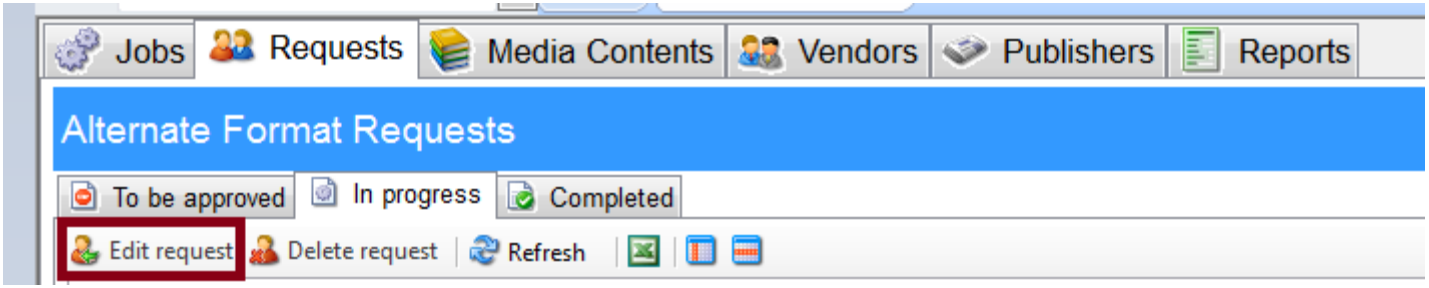
To be approved: How to add/remove row formatting



- On the Requests tab
- Under the “To be approved” tab
- Click on the button beside the Show Columns button
- See photo

You can also, right-click and select “Show Row Formattings”

In Progress: How to edit a request



Step 1: Go to the Requests tab

Step 2: Under the Requests tab, there's another three tabs. Go to "In Progress".

Step 3: Select the request that you want to edit

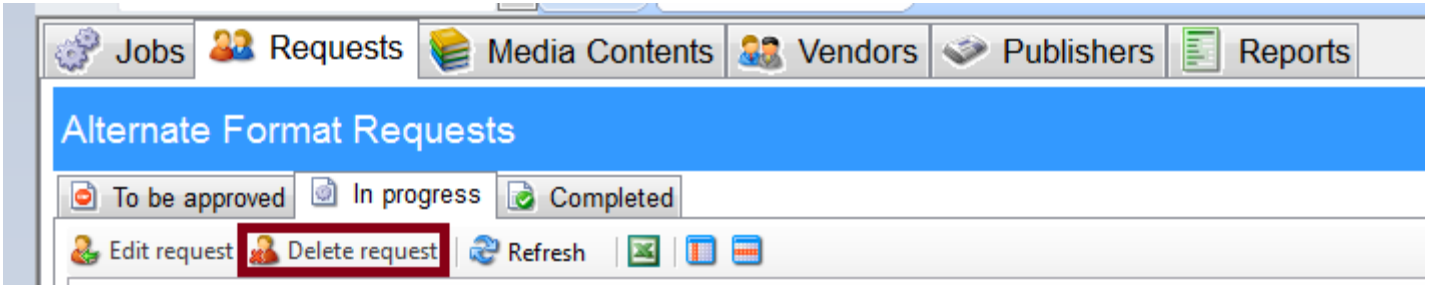
Step 4: Clicked on "Edit request". See photo.

You may also double-click on a request to edit it.

There's also a button on the ribbon bar called "Edit Request"

Or you can also, right-click and select "Edit Request"

In Progress: How to delete a request



Step 1: Go to the Requests tab

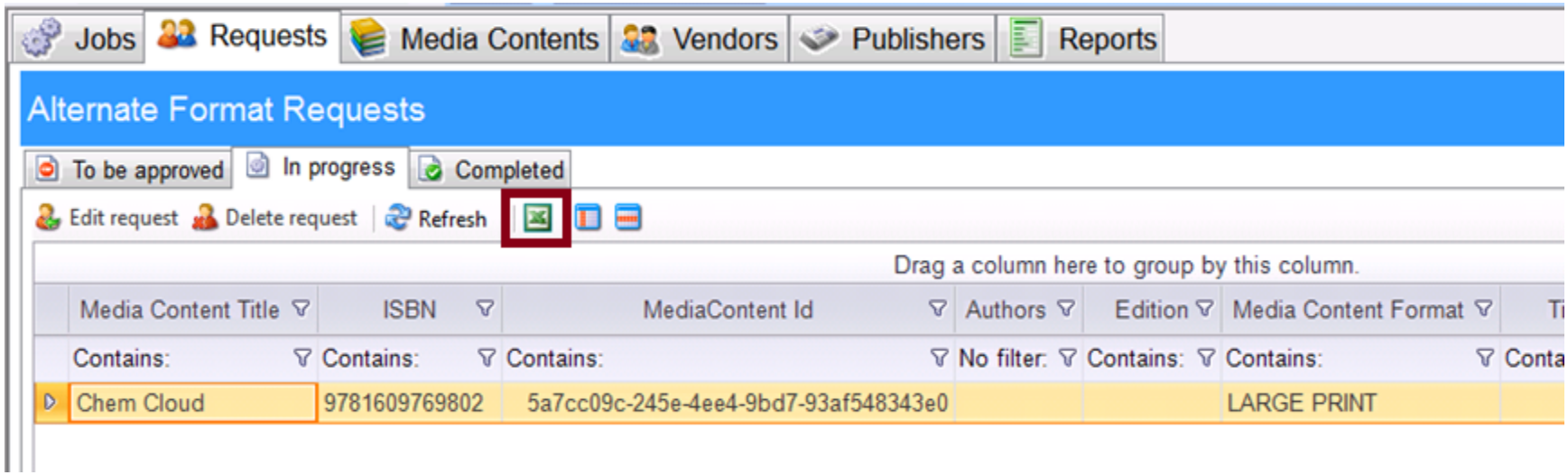
Step 2: Under the Requests tab, there's another three tabs. Go to "In Progress".

Step 3: Select the request that you want to delete

Step 4: Clicked on "Delete request". See photo.

You can also, right-click and select "Delete Request"

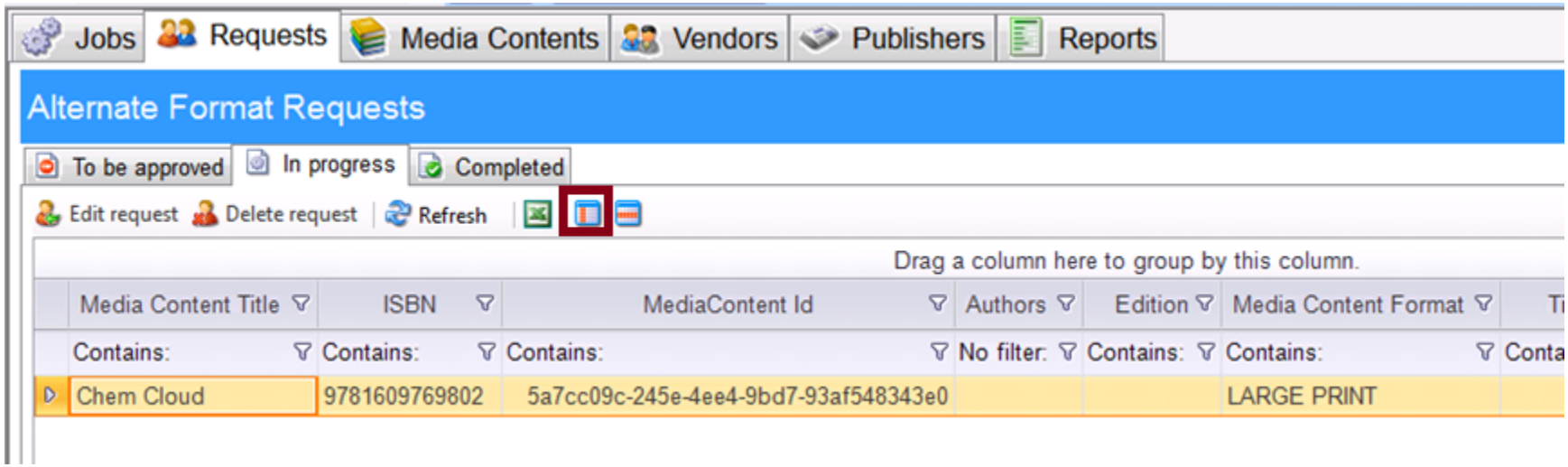
In Progress: How to export the request list to Excel



- On the Requests tab
- Under the “In progress” tab
- Click on the Excel Sheet button
- See photo

You can also, right-click and select “Export to Excel”

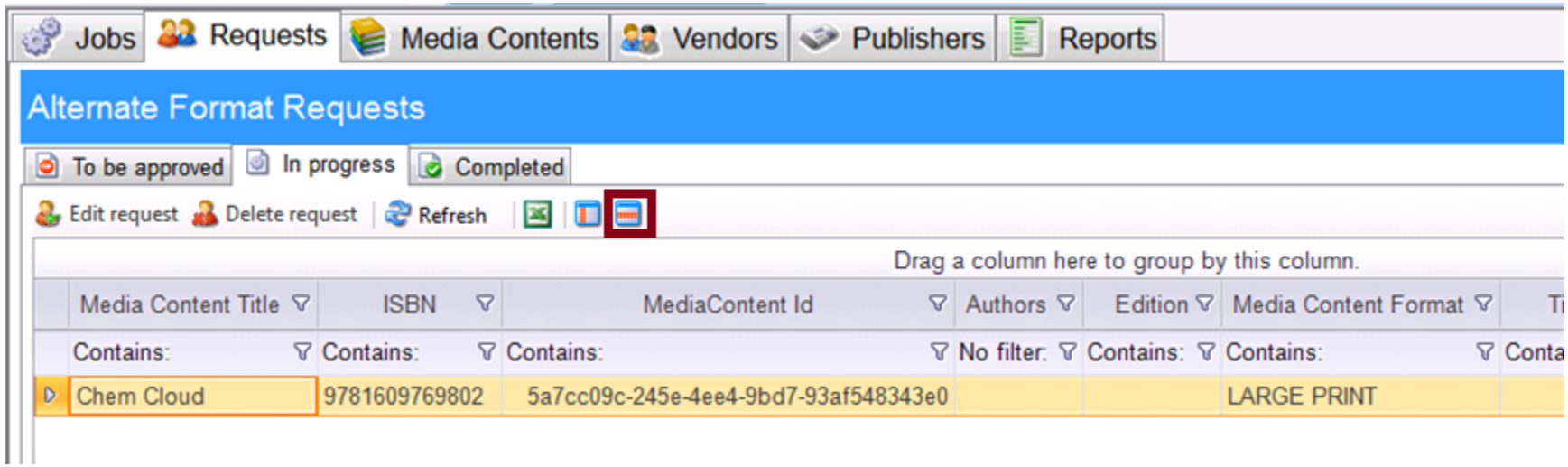
In Progress: How to show columns



- On the Requests tab
- Under the “In progress” tab
- Click on the button beside the Excel Sheet button
- See photo

You can also, right-click and select “Show/Hide Columns”

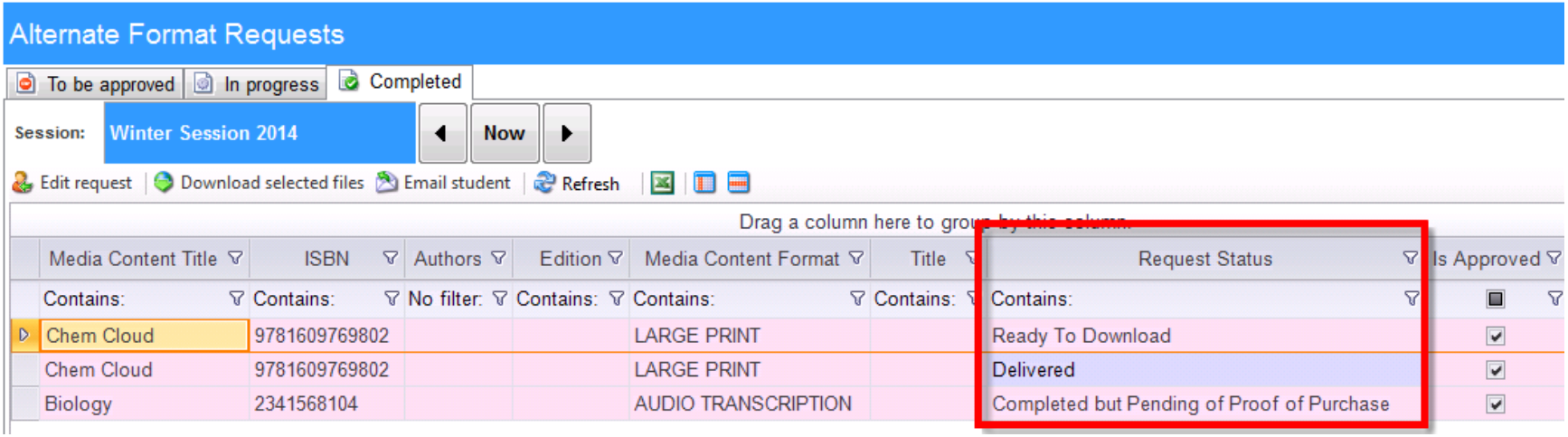
In Progress: How to add/remove row formatting



- On the Requests tab
- Under the “In progress” tab
- Click on the button beside the Show Columns button
- See photo

You can also, right-click and select “Show Row Formatting”

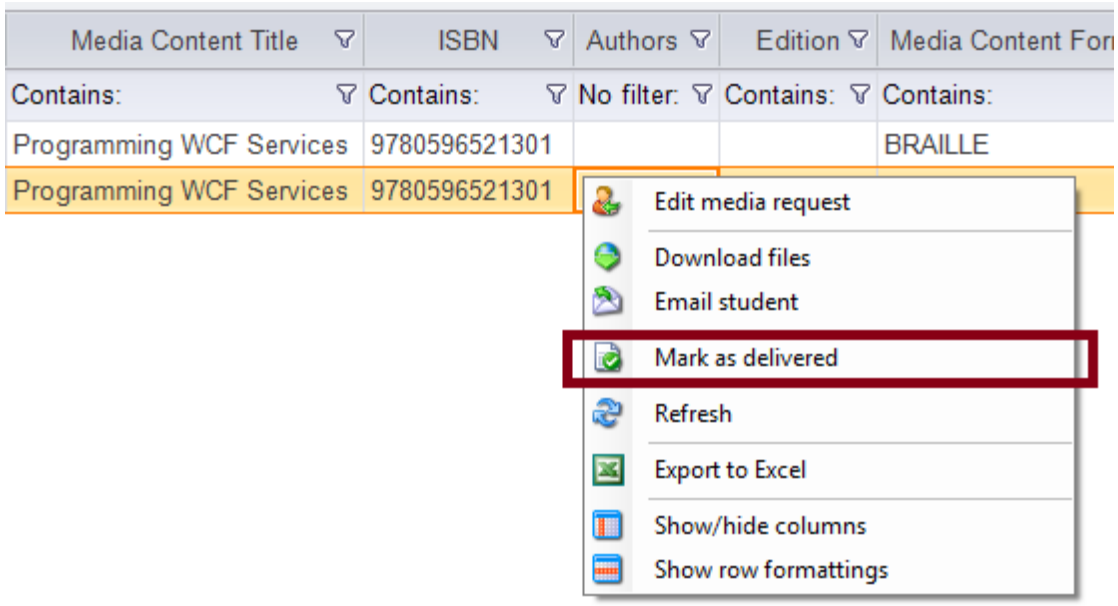
Completed



Request Status

- **Ready to Download:** This means the job is done and the material is available for distribution
- **Delivered:** This means that the student has picked up the material(s)
- **Completed but Pending of Proof of Purchase:** This means that the job is done and the material is not available for distribution. The student needs to provide the proof of purchase to download the file.

Completed: How to mark the requests as delivered

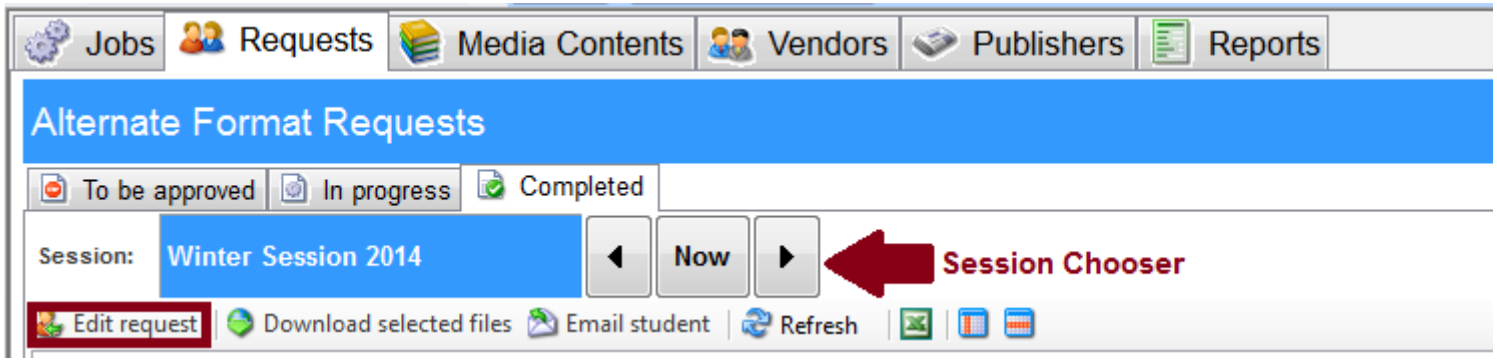


Step 1: Select the request you wish to mark as delivered

Step 2: Right-click

Step 3: Select “Mark as delivered”

Completed: How to edit request



Step 1: Go to the Requests tab

Step 2: Under the Requests tab, there's another three tabs. Go to "In Progress".

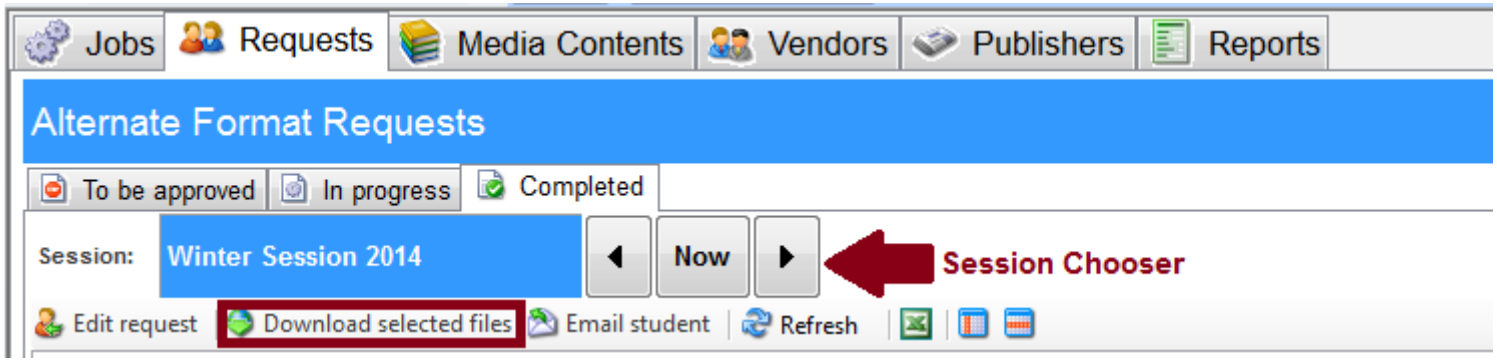
Step 3: Select the request that you want to edit

Step 4: Clicked on "Edit request" See photo.

You may also double-click on a request to edit it.

There's also a button on the ribbon bar called "Edit Request". Or you can also, right-click and select "Edit Request"

Completed: How to download files



Step 1: Go to the Requests tab

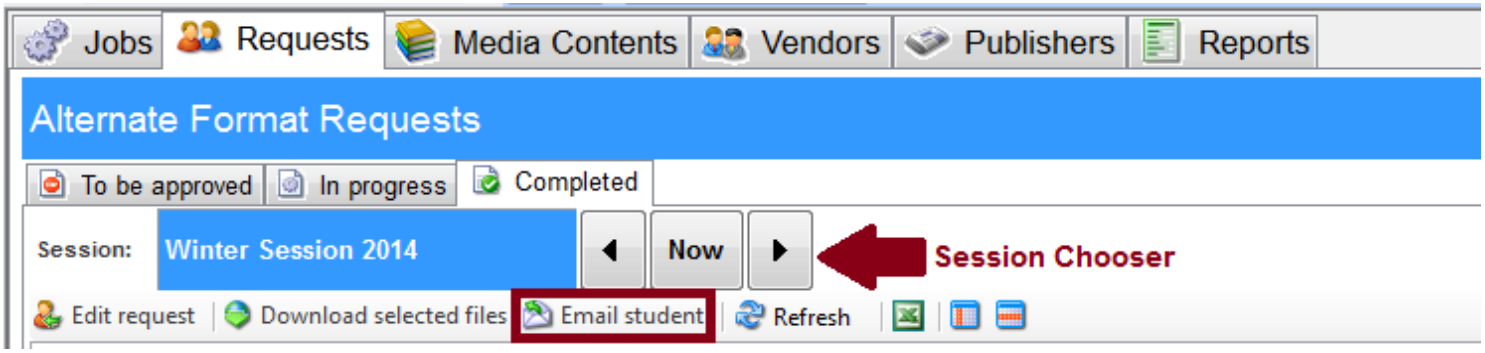
Step 2: Under the Requests tab, there's another three tabs. Go to "Completed".

Step 3: Select the request that you want to download

Step 4: Clicked on "Download selected files" See photo.

You can also, right-click and select "Download selected files"

Completed: How to email students



Step 1: Go to the Requests tab

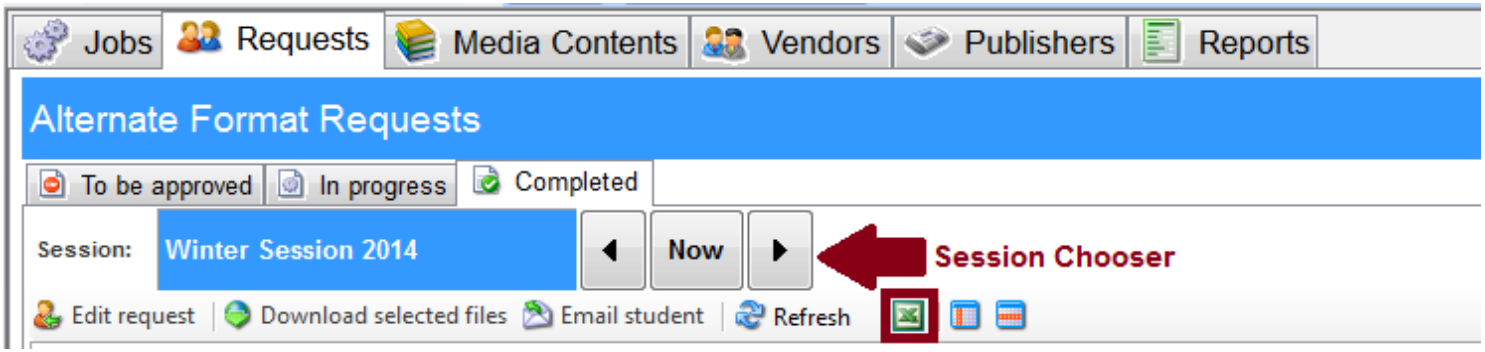
Step 2: Under the Requests tab, there's another three tabs. Go to "Completed".

Step 3: Select the request that you want to email the student

Step 4: Clicked on "Email Student" See photo.

You can also, right-click and select "Email student"

Completed: How to export to Excel



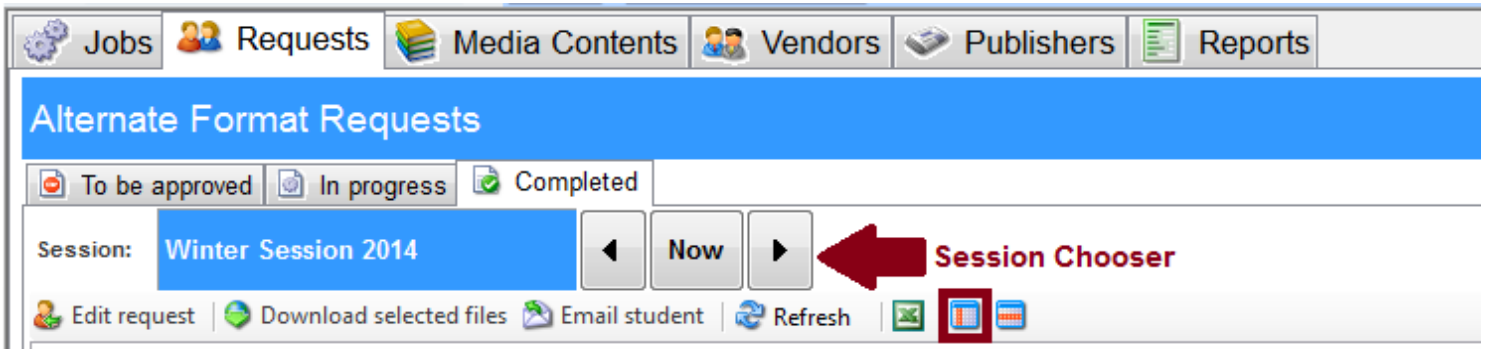
Step 1: Go to the Requests tab

Step 2: Under the Requests tab, there's another three tabs. Go to "Completed".

Step 3: Clicked on Excel icon beside Refresh See photo.

You can also, right-click and select "Export to Excel"

Completed: How to show columns



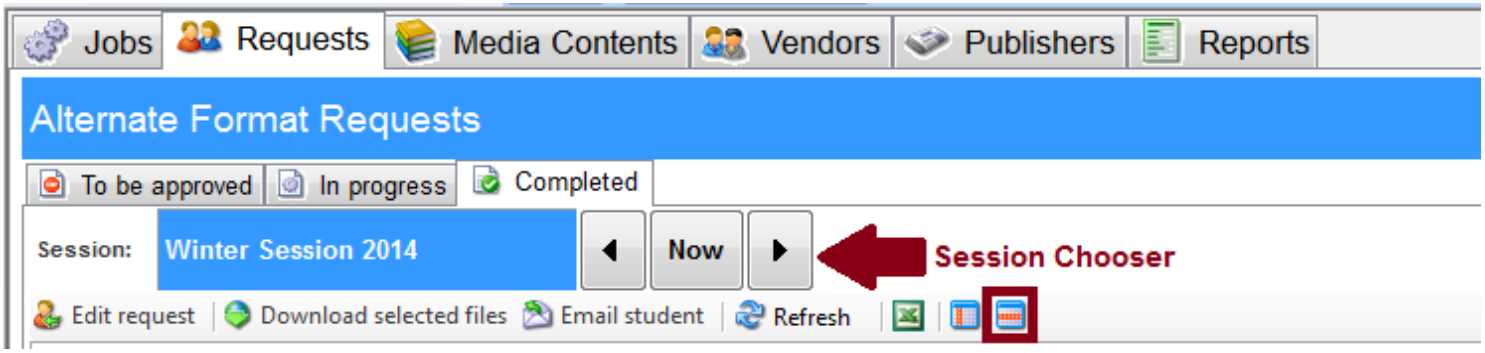
Step 1: Go to the Requests tab

Step 2: Under the Requests tab, there's another three tabs. Go to "Completed".

Step 3: Clicked on icon beside the Excel icon See photo.

You can also, right-click and select "Show/Hide Columns"

Completed: How to add/remove row formatting



Step 1: Go to the Requests tab

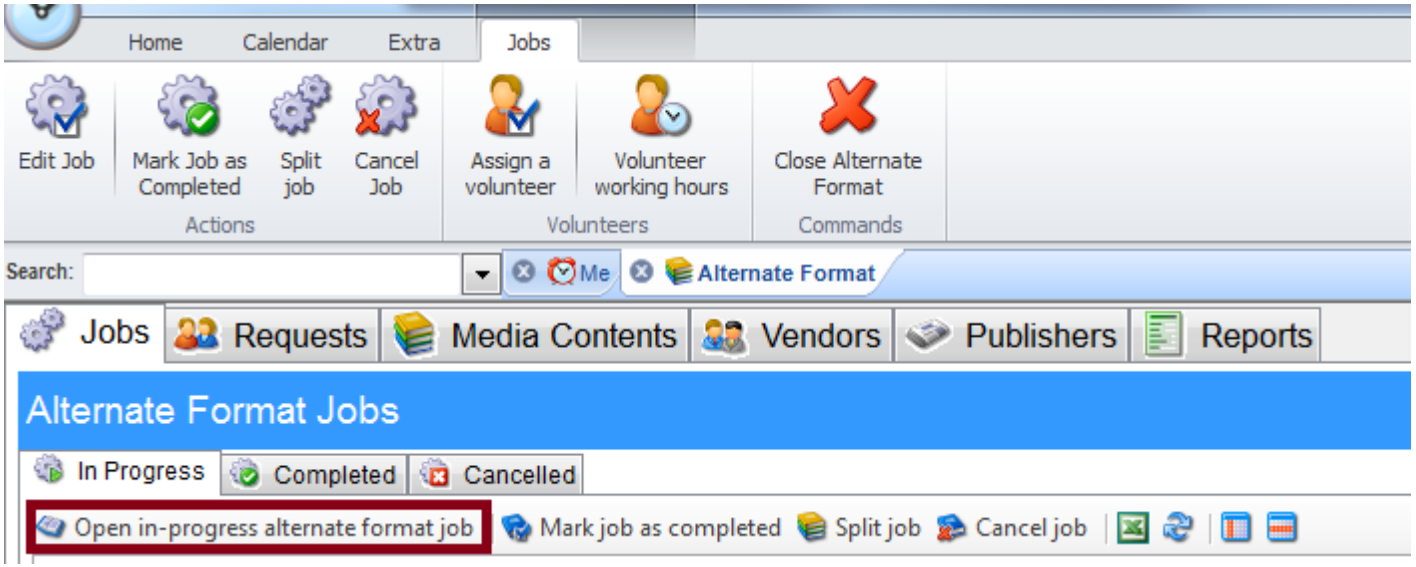
Step 2: Under the Requests tab, there's another three tabs. Go to "Completed".

Step 3: Clicked on the last icon. See photo.

You can also, right-click and select "Show Row Formatting"

JOBS

In-progress: How to open a job

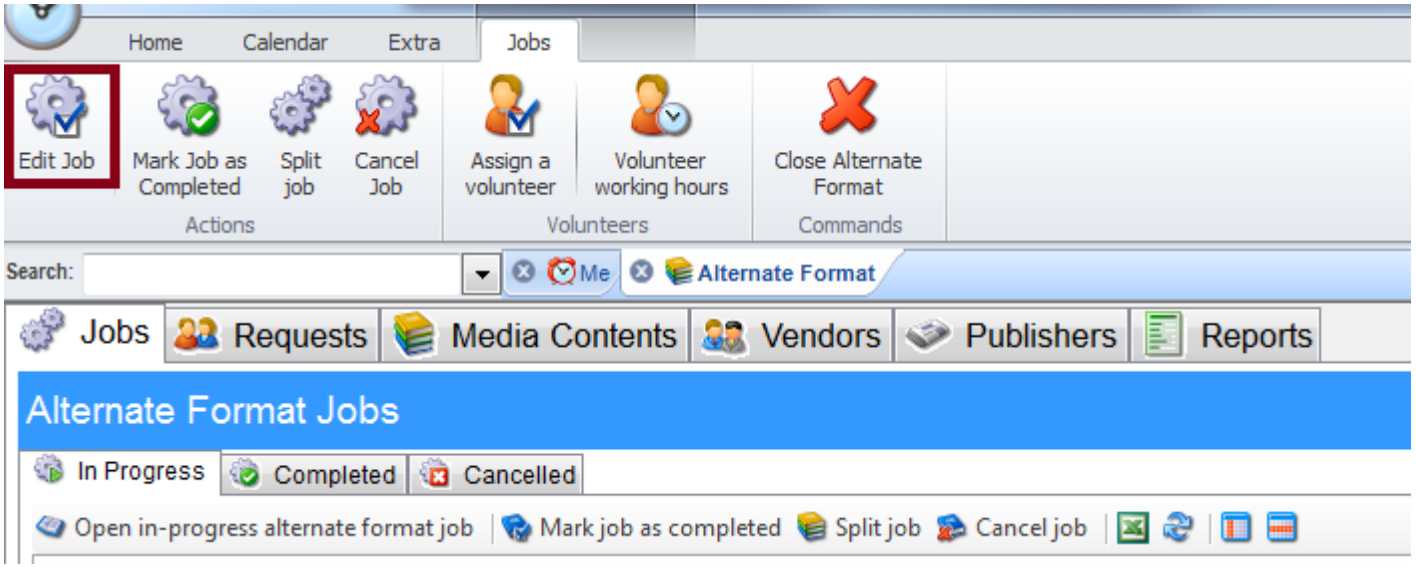


To open a job, select a job that you want to open. And then click on “Open in-progress alternate format job”.

Or right-click and select “Open in-progress alternate format job”

You can also, double-click to open the job

In-progress: How to edit a job

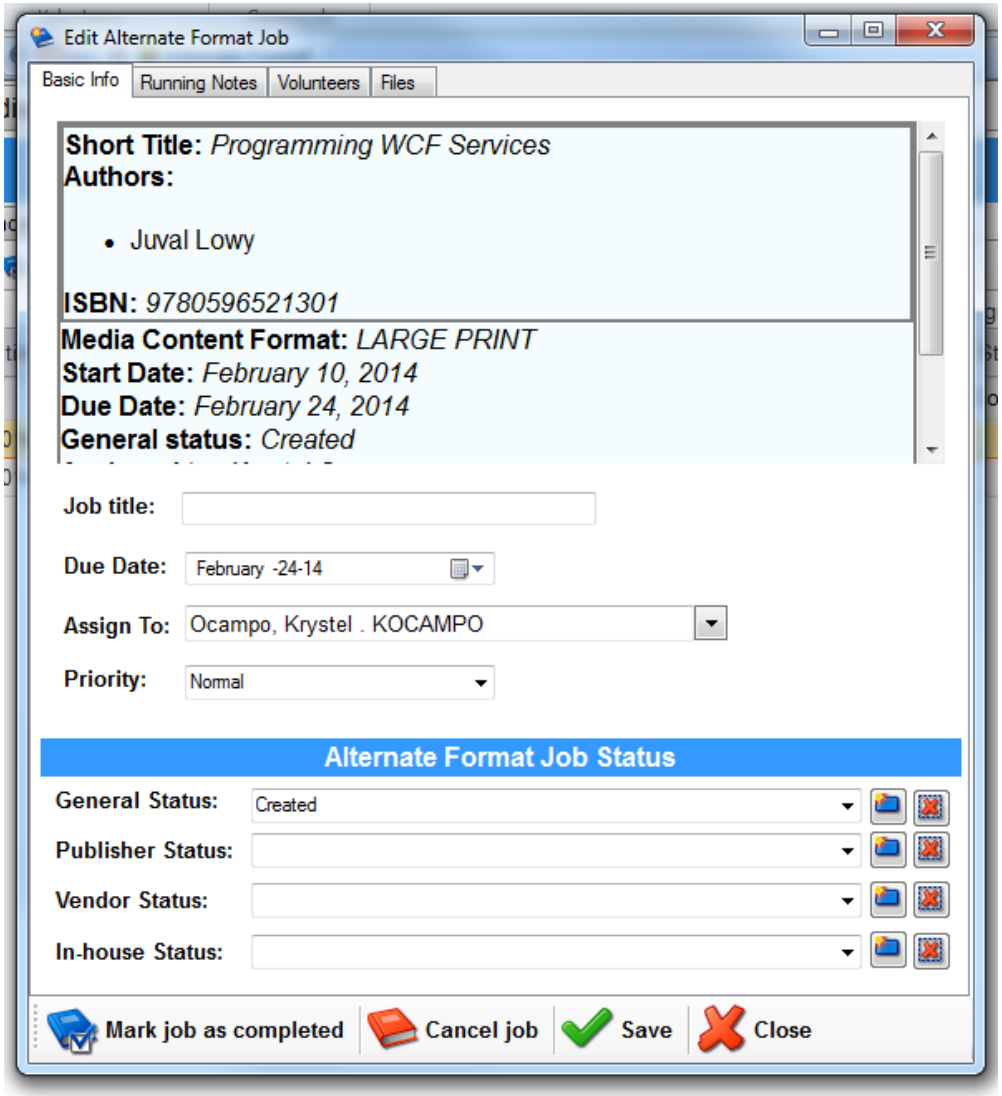


To edit a job, select a job that you want to edit.

And then on the ribbon bar, click on “Edit Job”.

You can also, double-click to edit the job

Job - Basic Info



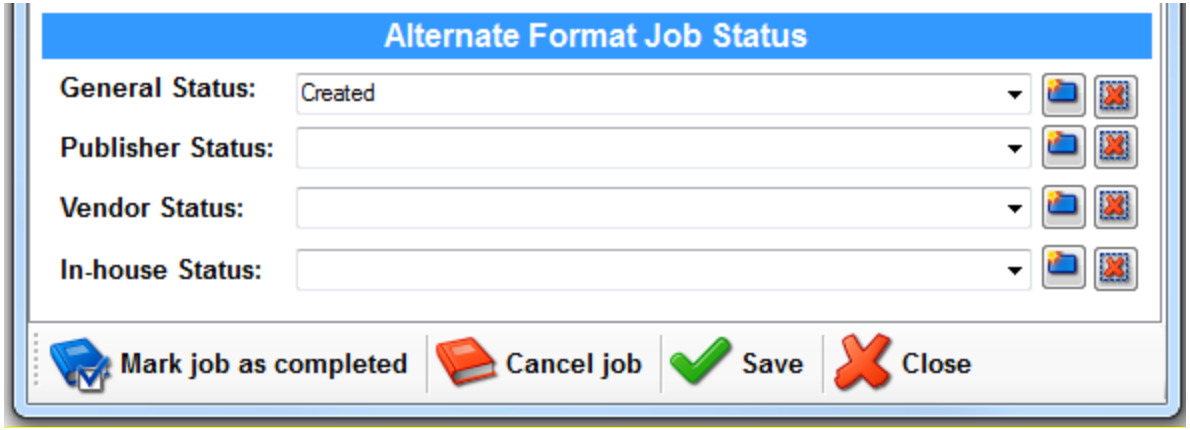
This screen gives you the information about the job.

Job Title:

Due date:

Assign To:

Priority:



General Status:

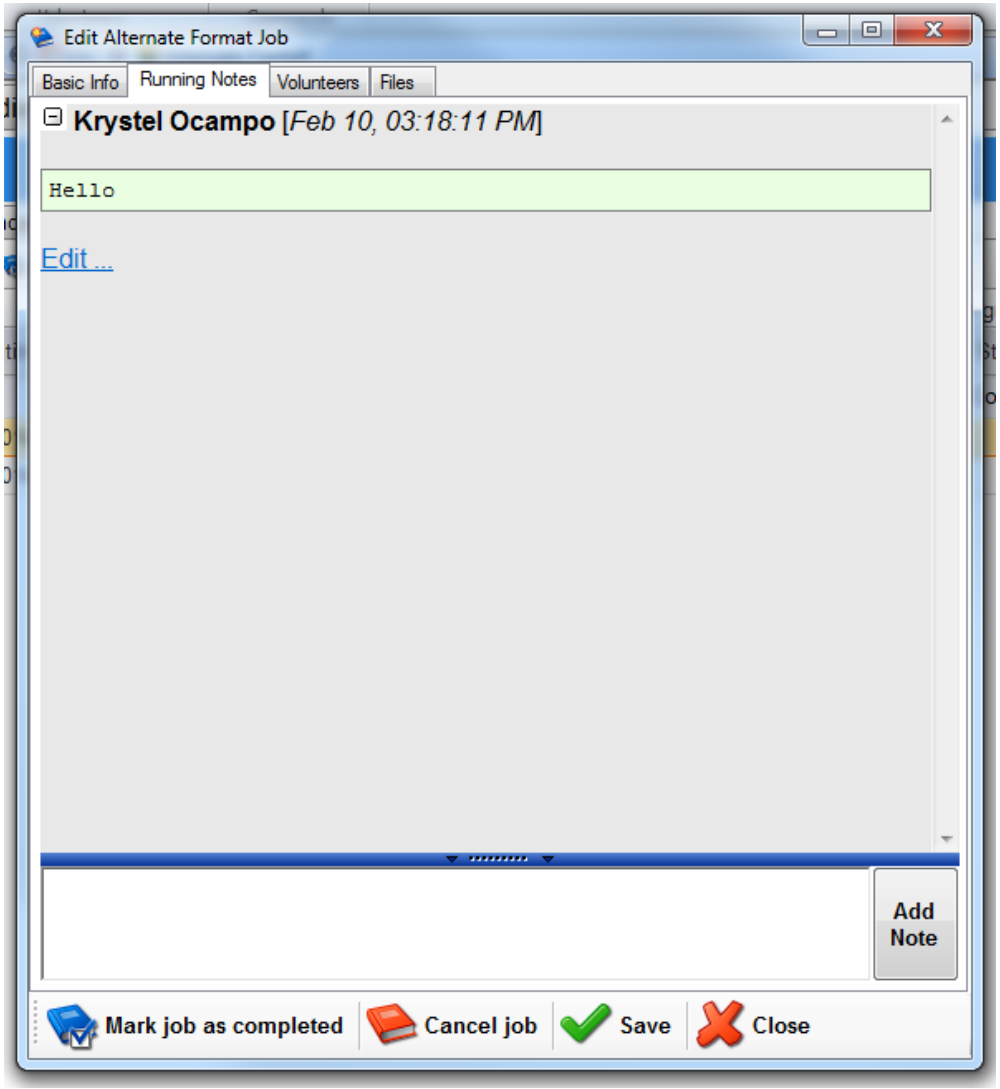
Publisher Status:

Vendor Status:

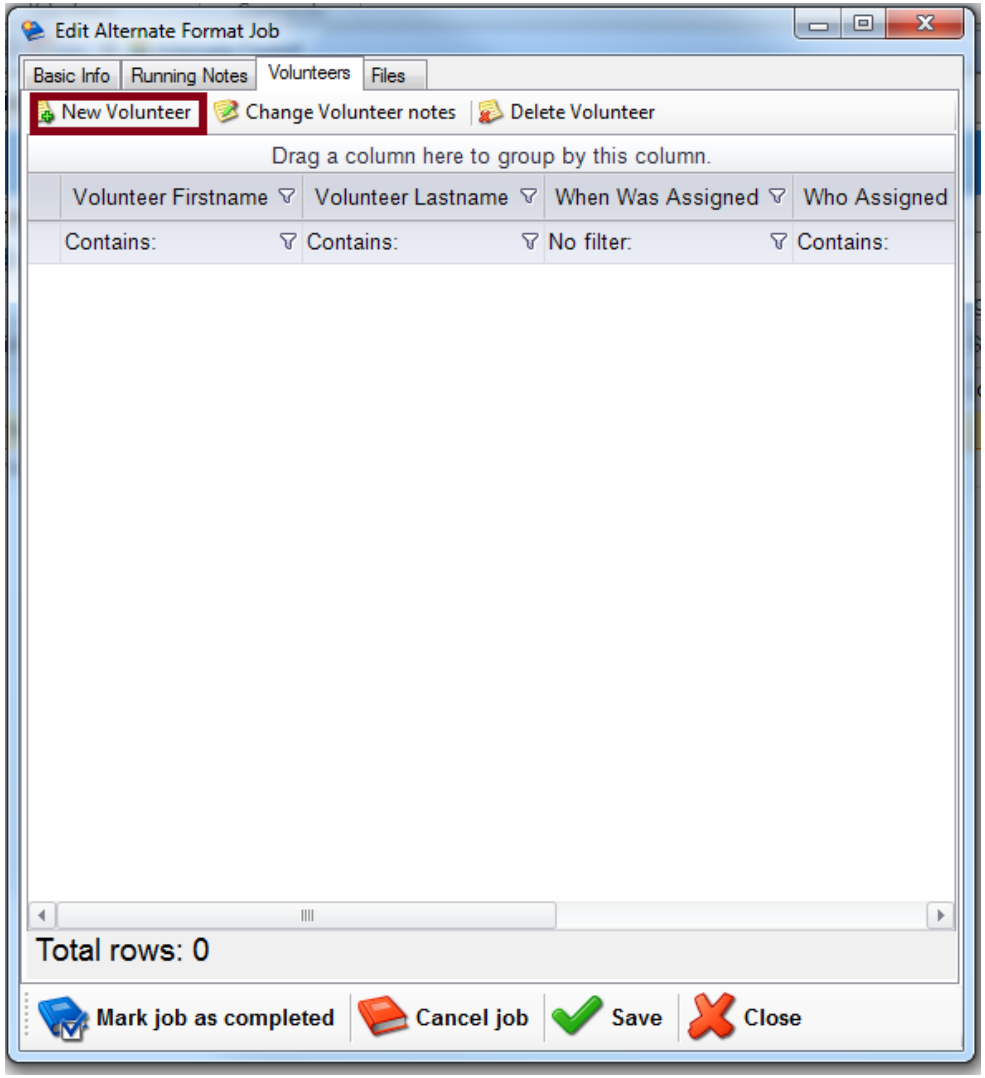
In-house Status:

Running Notes

You can add notes about the job for your staff to see**.**



How to add a volunteer



If you're not already in this page:

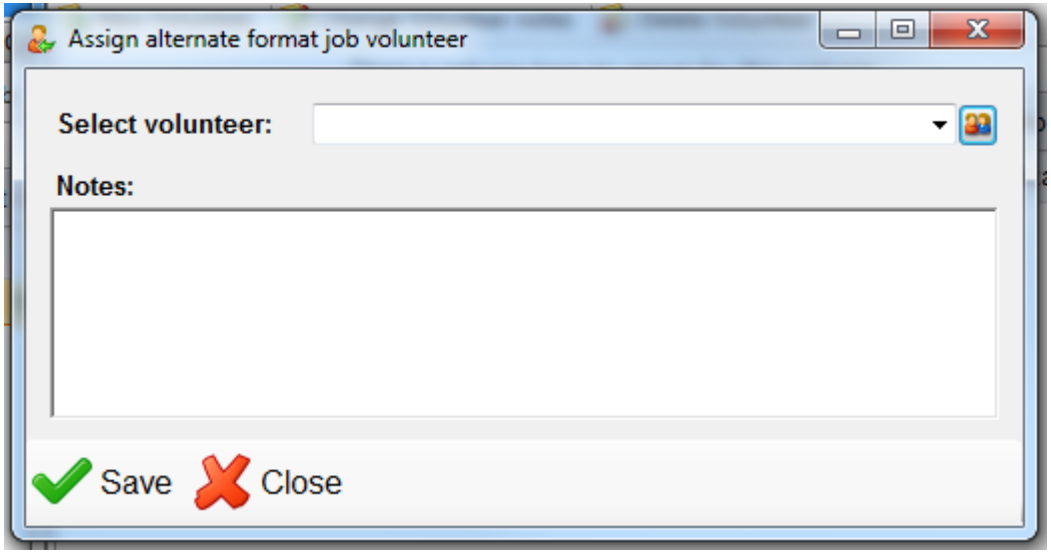
Step 1: Go to the Jobs tab

Step 2: Open a job

Step 3: Go to the Volunteers tab

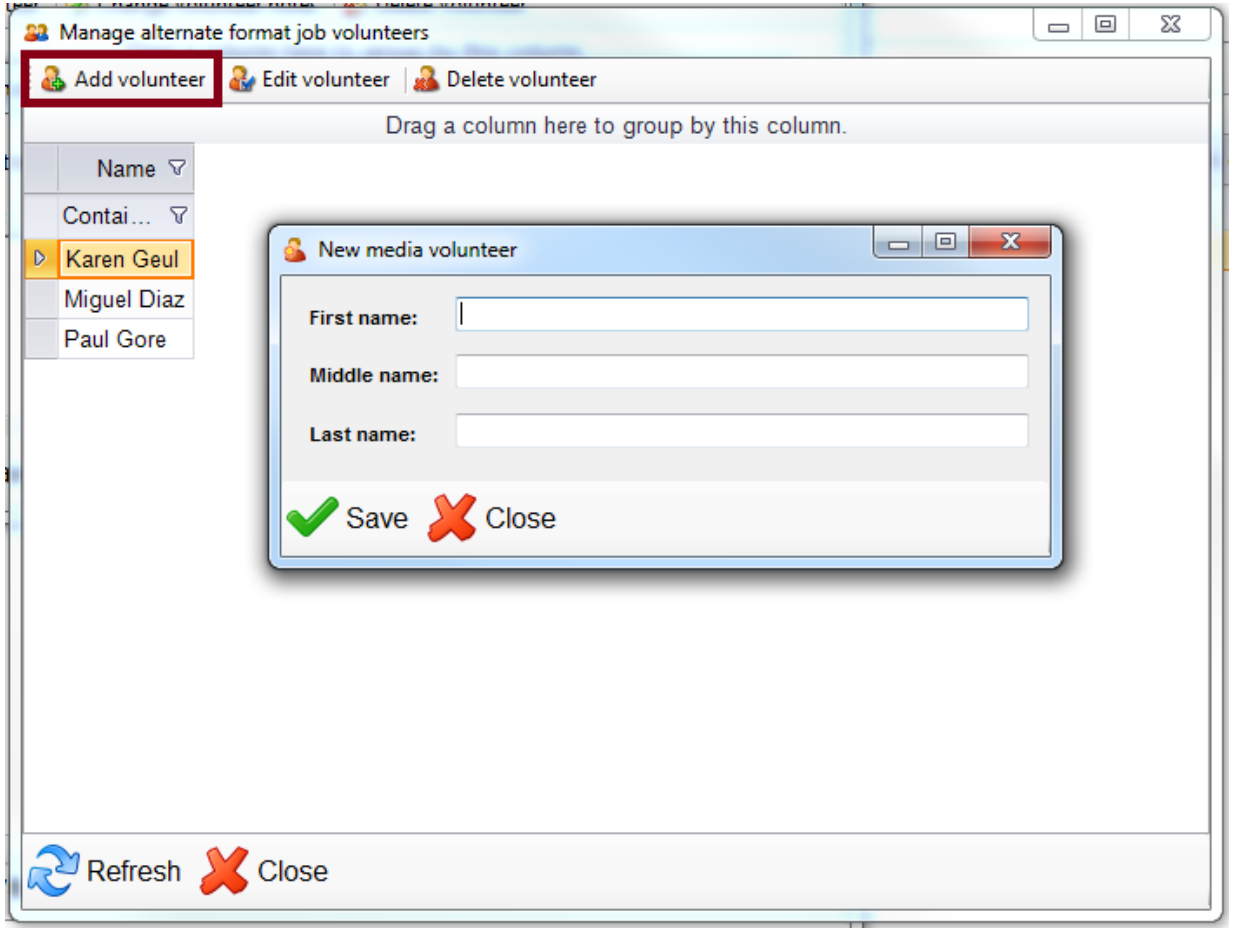
Then,

Step 4: Click on "New Volunteer"



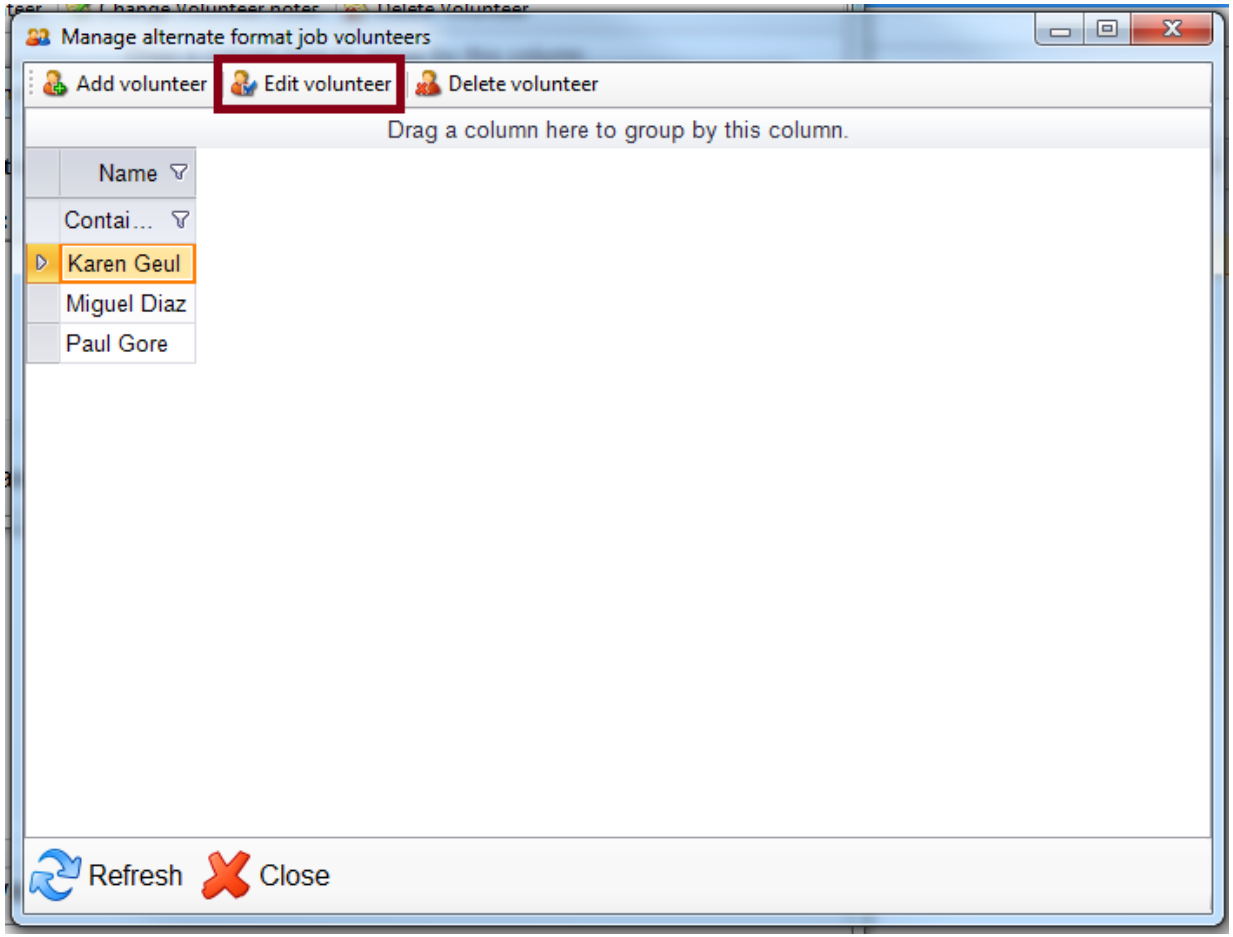
When you press the “New Volunteer”, you should get another screen like this. It will have a drop-down menu, Notes, and a button where you can add the volunteers.

Click on the button on the right to add new volunteers in the list.



Once, you click on the button. It will take you to a screen where it list down all the volunteers' name.

To add a new volunteer, click on "Add Volunteer". Then a screen with the title "New Media Volunteer" should pop-up. Then fill out the volunteer's information. And then press Save.

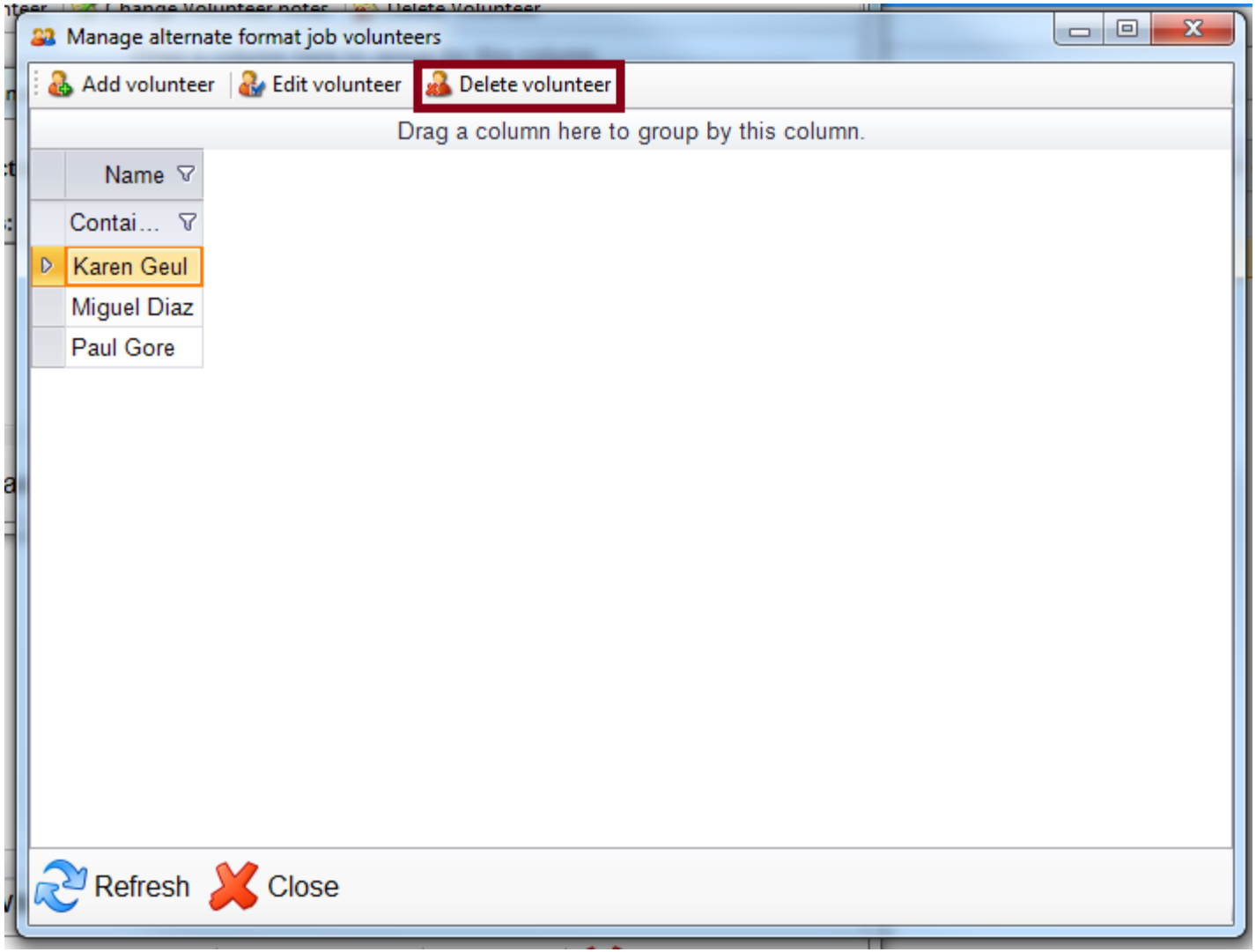


How to edit a volunteer

Step 1: Go to the "Manage alternate format job volunteers" screen

Step 2: Select a volunteer

Step 3: Click on Edit Volunteer

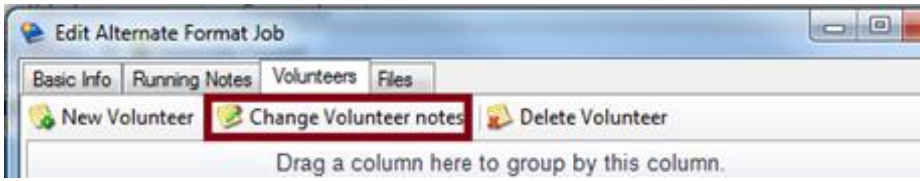


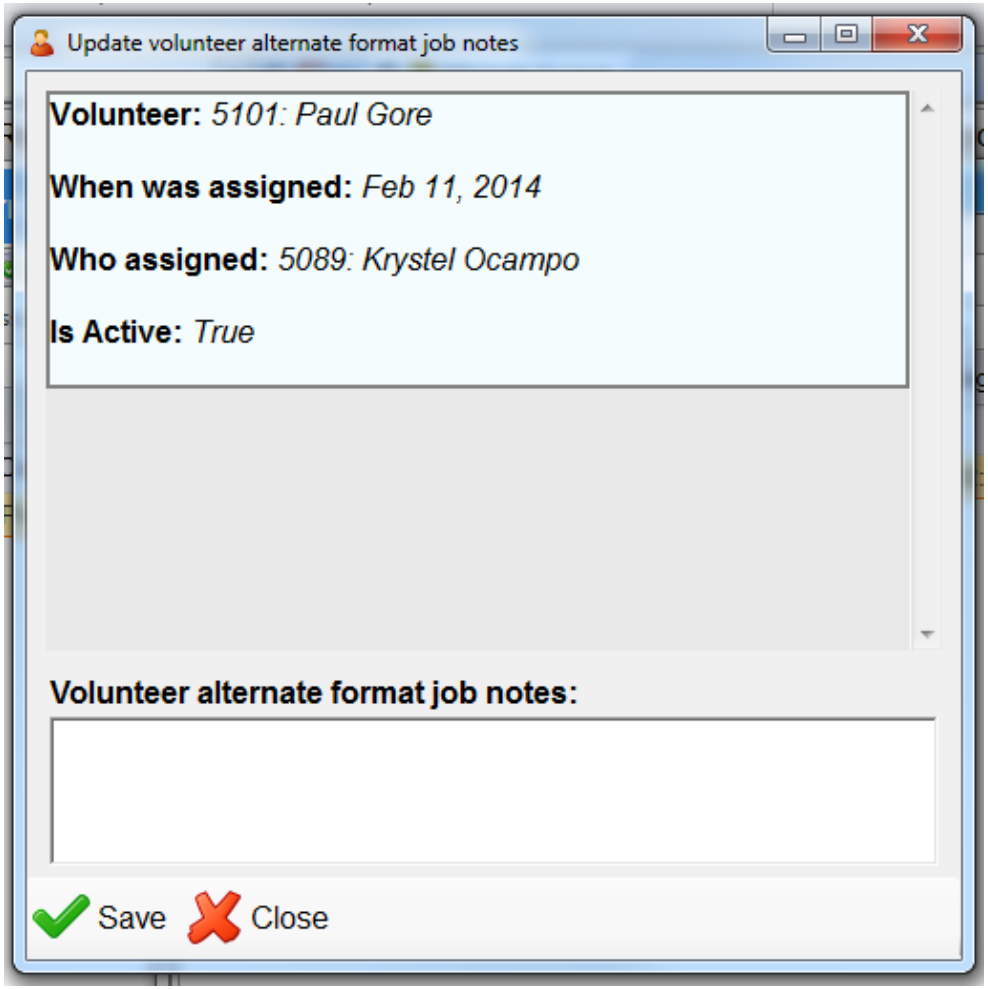
Step 1: Go to the “Manage alternate format job volunteers” screen

Step 2: Select a volunteer

Step 3: Click on Delete Volunteer

How to change volunteer notes



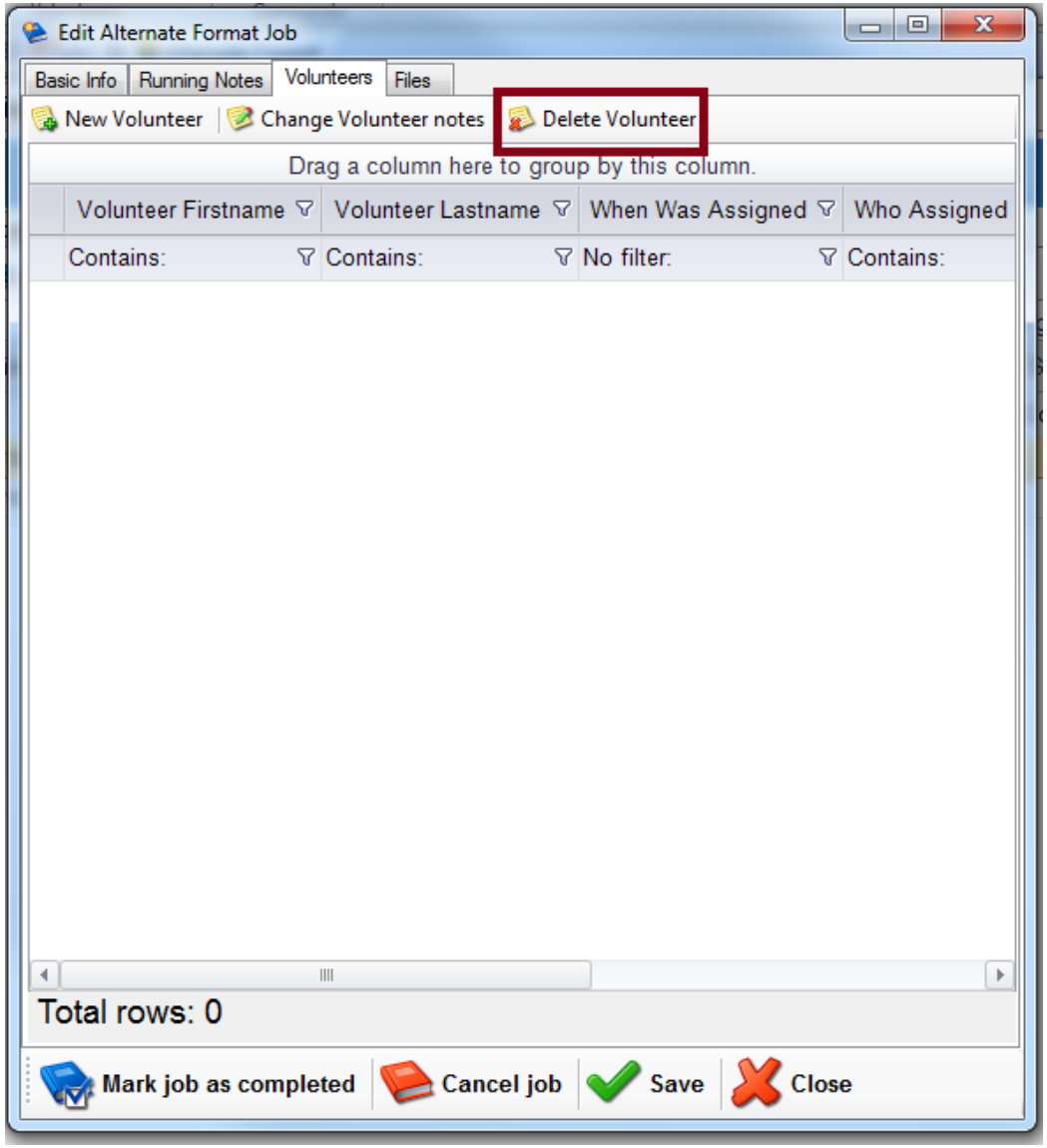


Step 1: Go to the “Volunteers” tab

Step 2: Click on “Change Volunteer notes”

Step 3: A screen like this should pop-up. Add or edit the notes in here.

How to remove a volunteer (from the list)

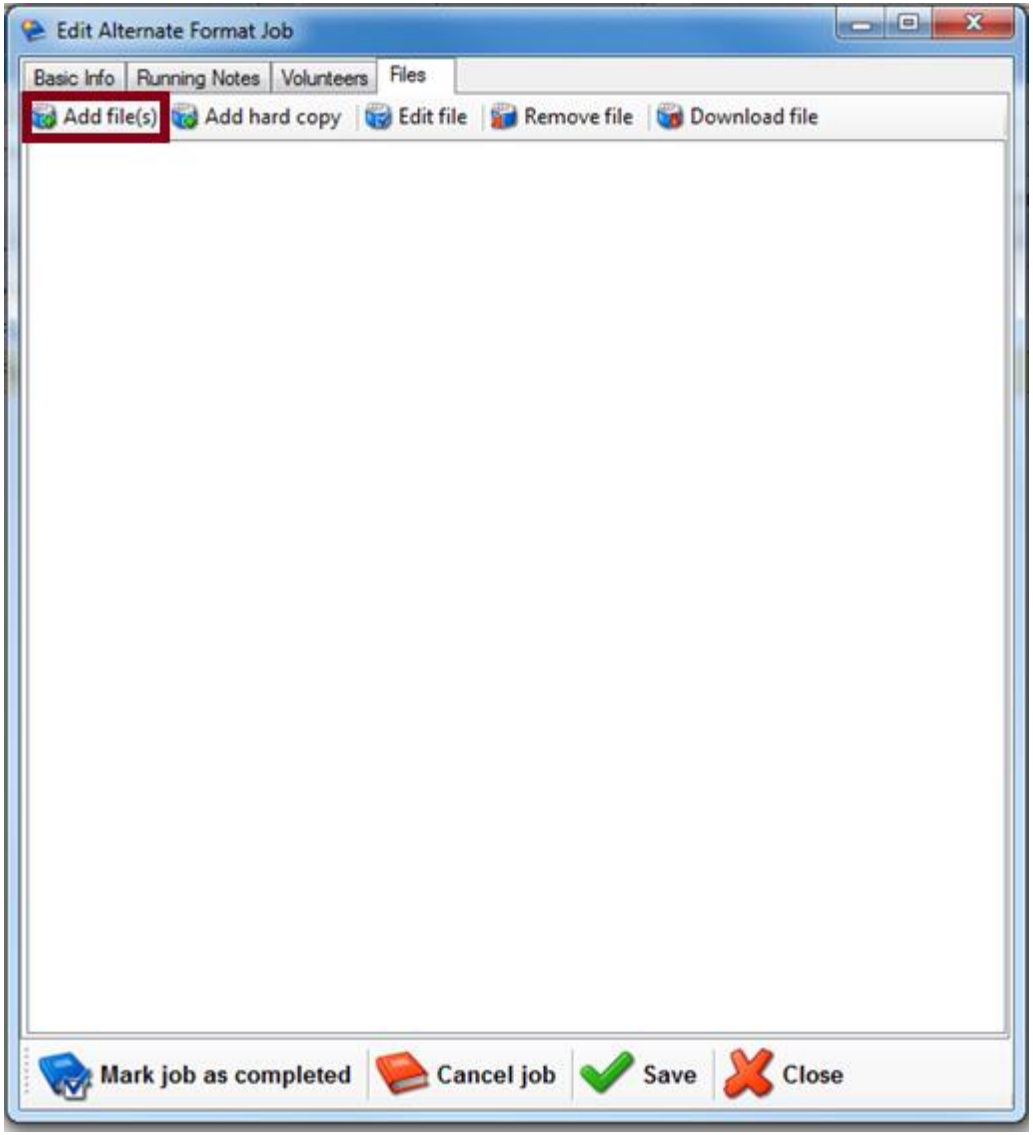


Step 1: Go to the “Volunteers” tab

Step 2: Select a volunteer

Step 3: Click on “Delete Volunteer”

How to add files

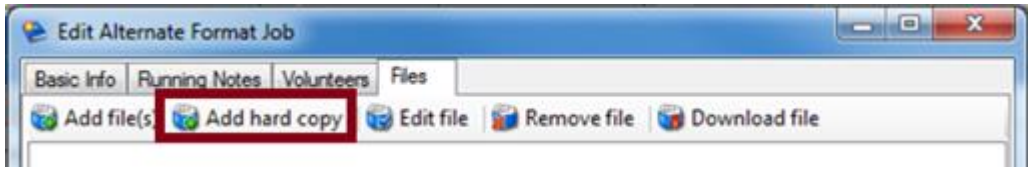


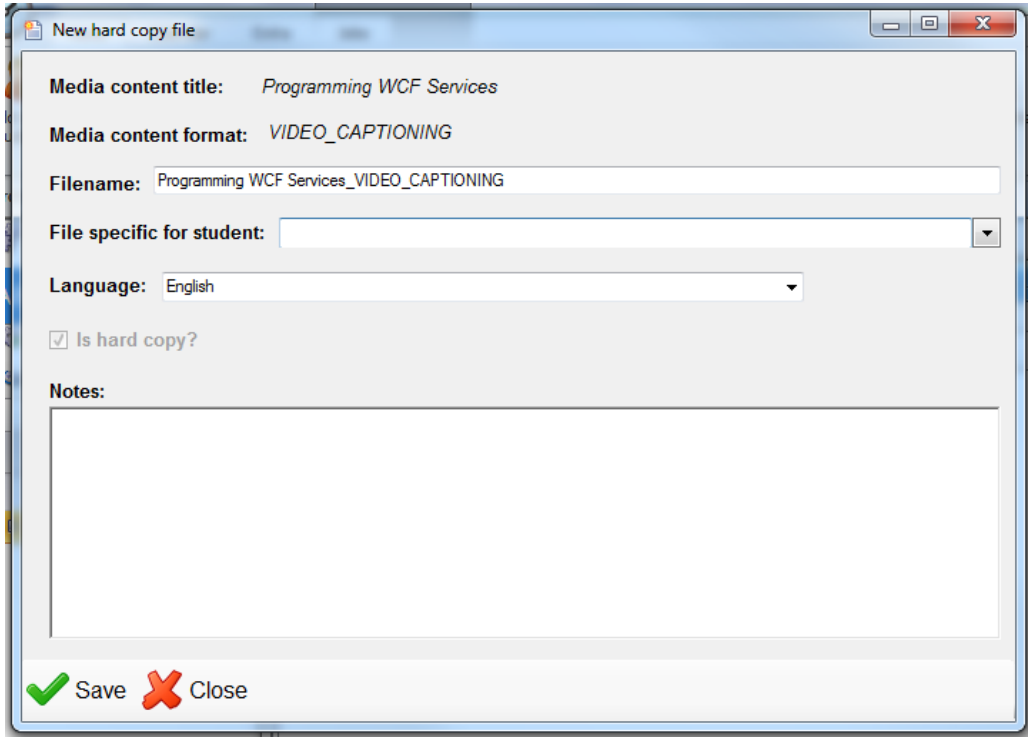
Step 1: Go to the “Files” tab

Step 2: Click on “Add File(s)”

Step 3: Select the files that you want to add.

How to add a hard copy





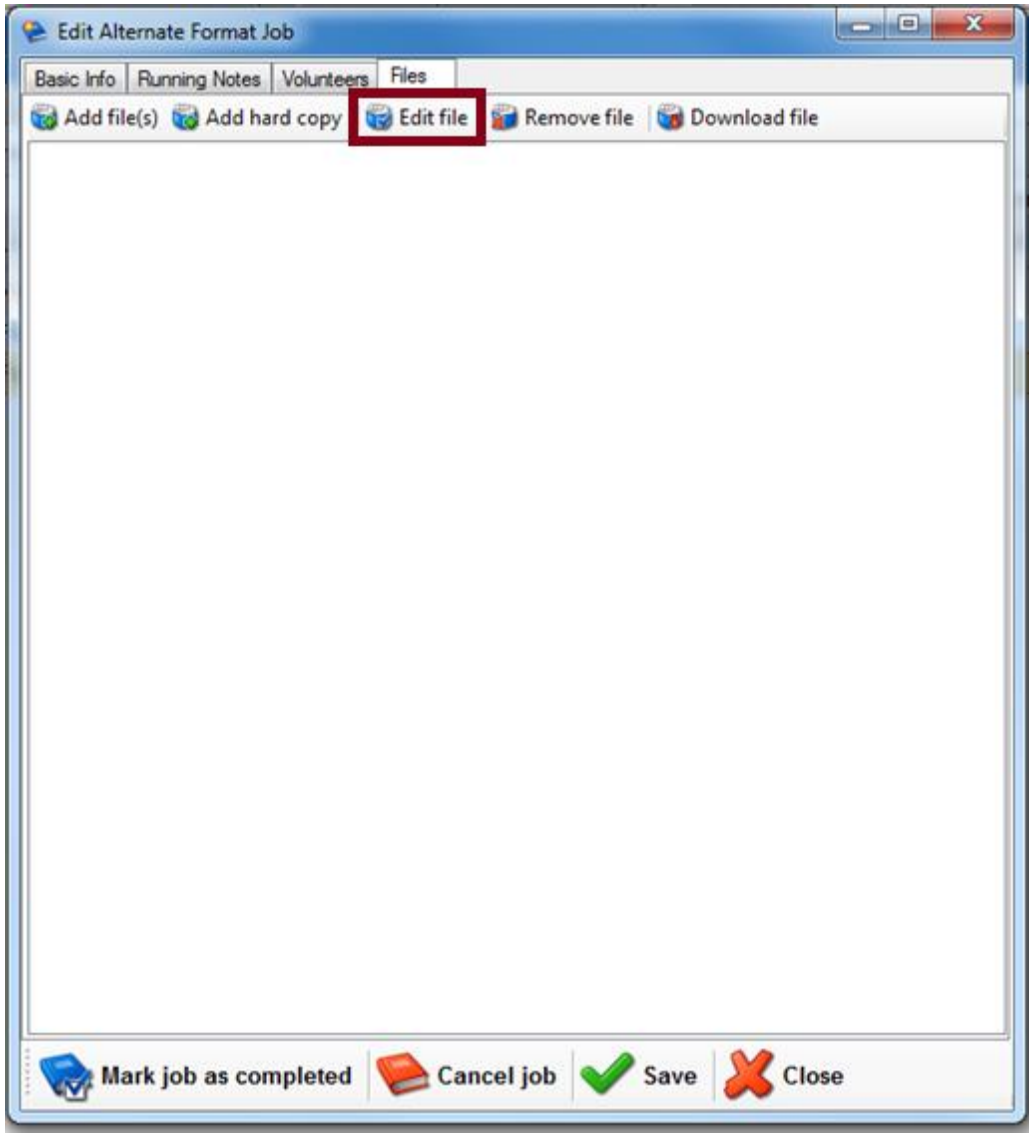
Step 1: Go to the “Files” tab

Step 2: Click on “Add hard copy”

Step 3: A pop-up screen should appear

Step 4: Add the hard copy’s information

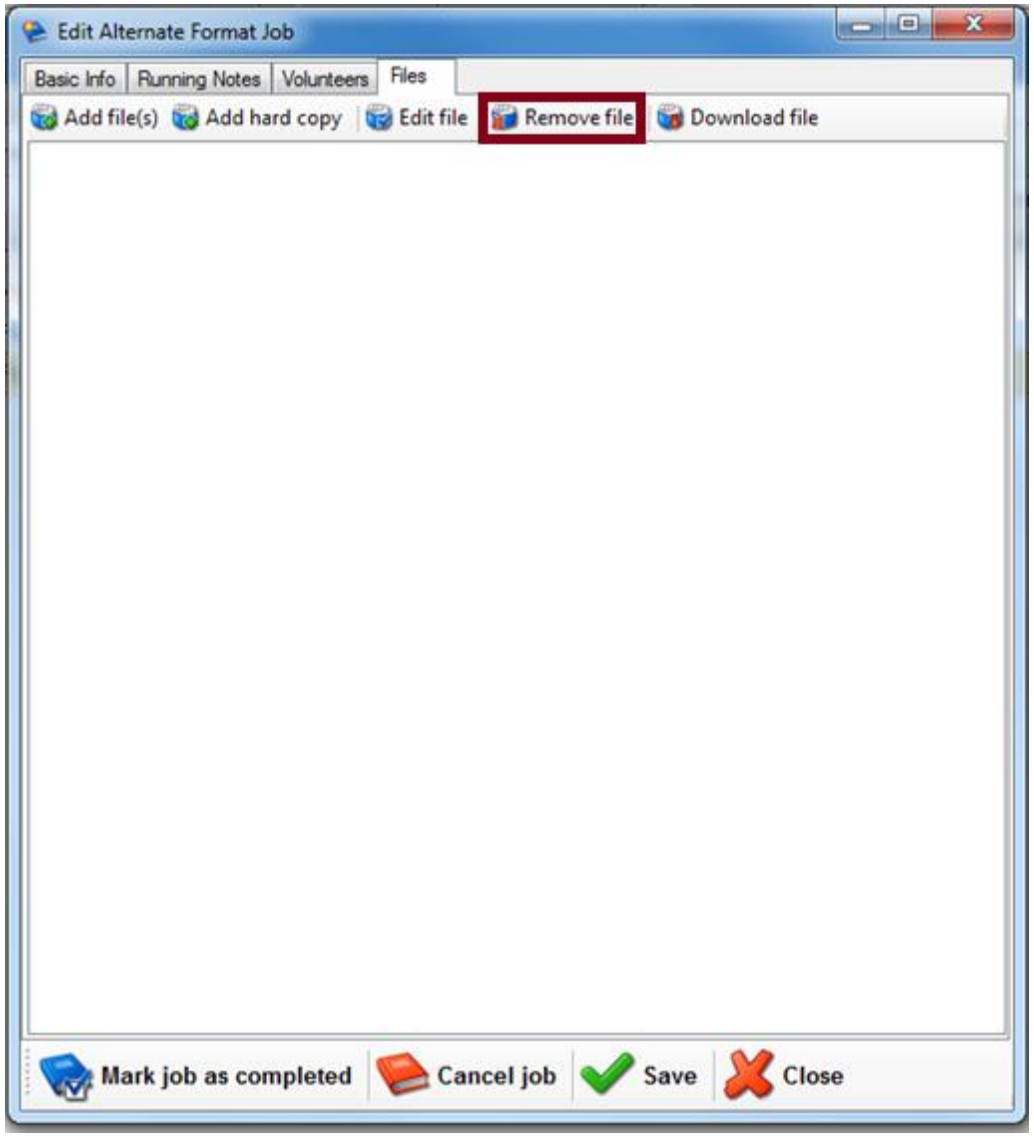
How to edit a file



Step 1: Go to the “Files” tab

Step 2: Click on “Edit file”

In-progress: How to remove a file

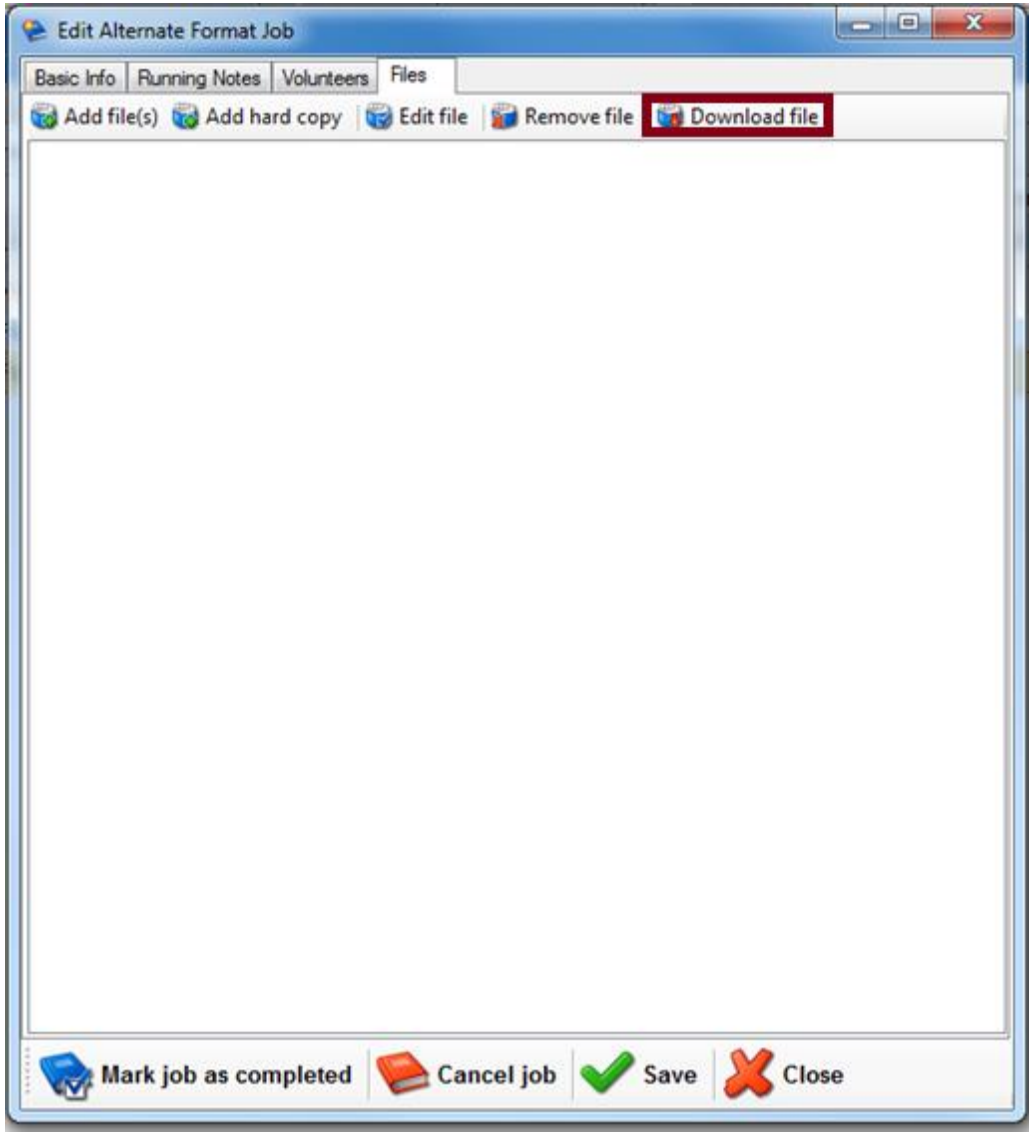


Step 1: Go to the “Files” tab

Step 2: Select the file you want to remove

Step 3: Click on “Remove File”

In-progress: How to download a file

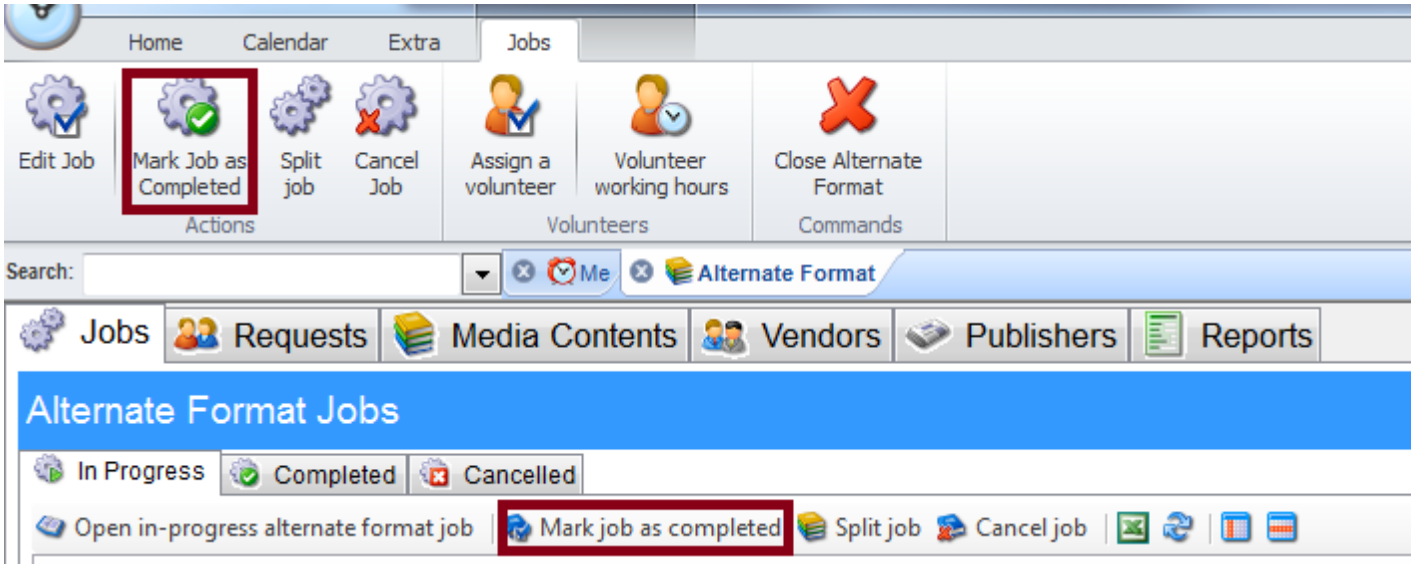


Step 1: Go to the “Files” tab

Step 2: Select on the file you want to download

Step 3: Click on “Download file”

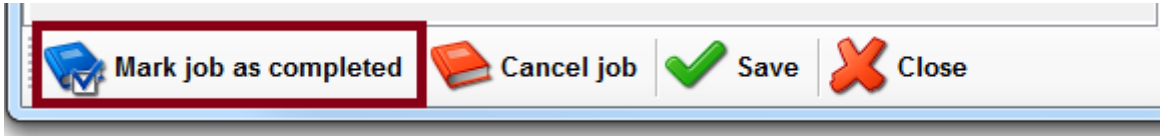
In-progress: How to mark job as completed



There are three ways to mark a job as completed.

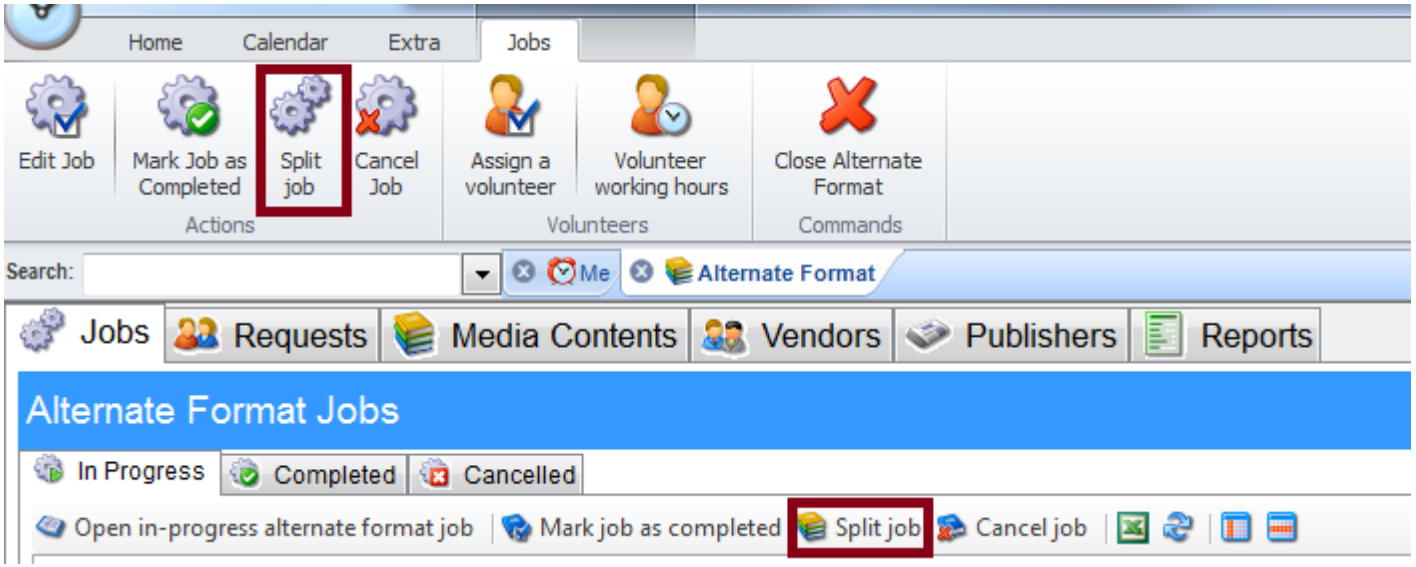
You can select it from the ribbon bar. See photo.

Or under the Jobs > In Progress tab > Mark as job completed. See photo.



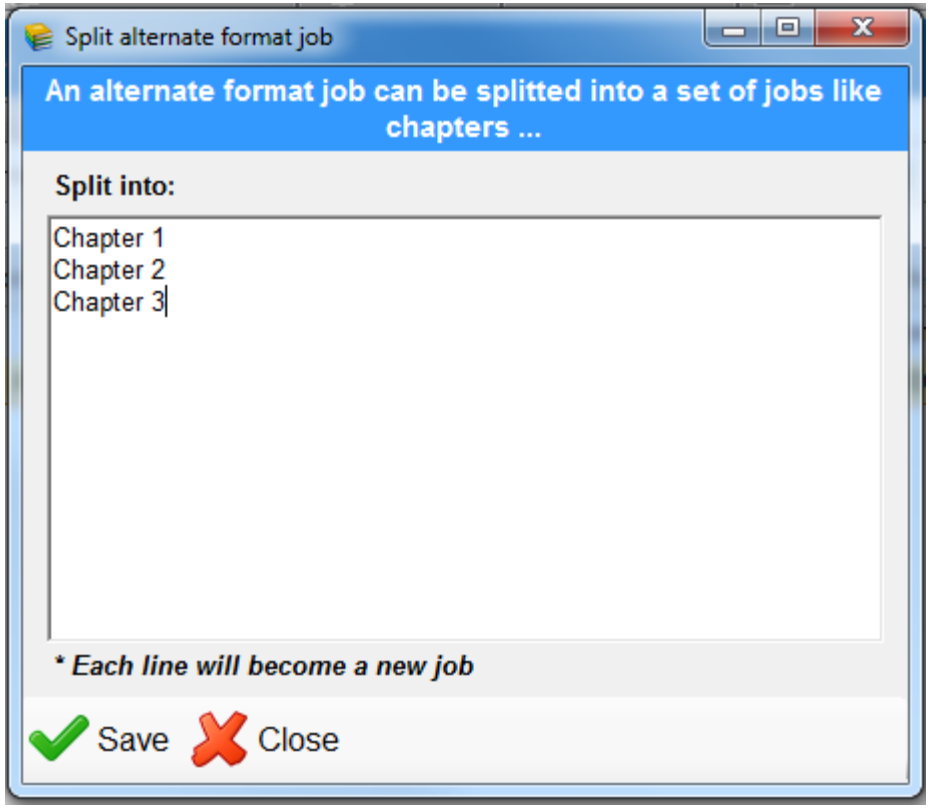
Also, when you open the job, there's an option at the bottom that says "Mark job as completed".

In-progress: How to split a job



There's two ways to split a job:

1. Ribbon bar. See photo.
2. Under Jobs > In Progress > Split Job. See photo.

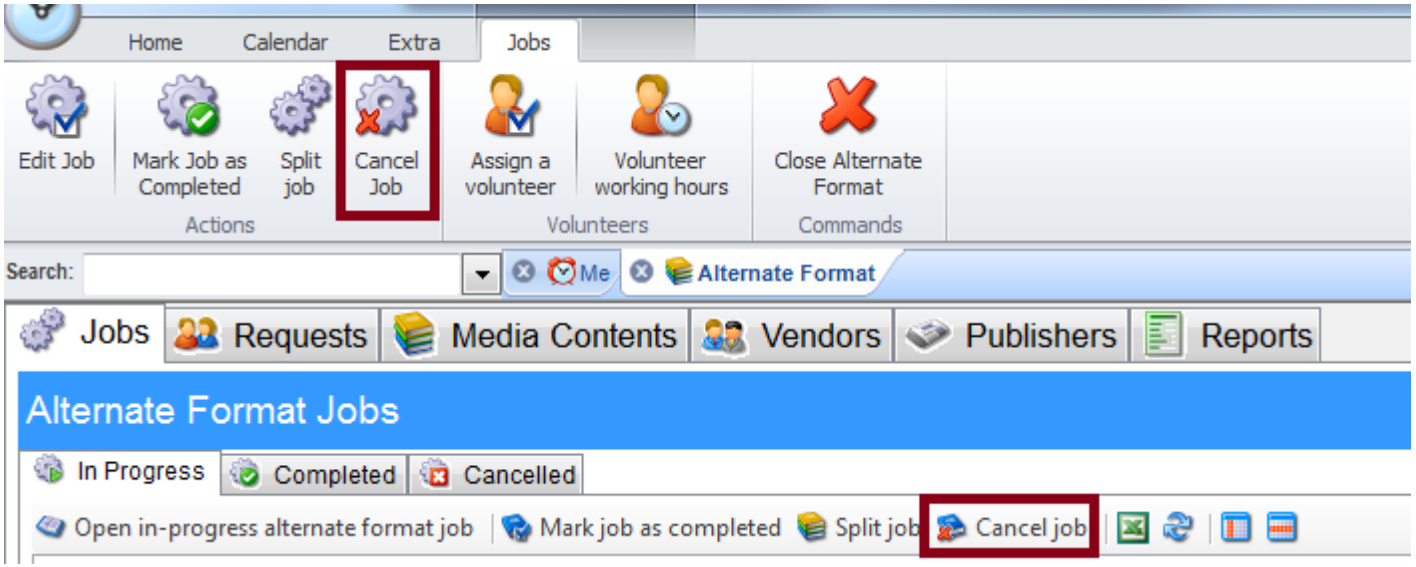


Once you clicked on the split job button, there would be a pop-up screen like this. See photo.

To split the job, type in the title. For every title it will become a job.

Split job: This is to separate the jobs into sub-jobs. For example, there's a book with 5 chapters, and the student only needs Chapter 1, 2, and 3. They don't need Chapter 4 or 5. So you're not going to create a job for Chapter 4 and 5.

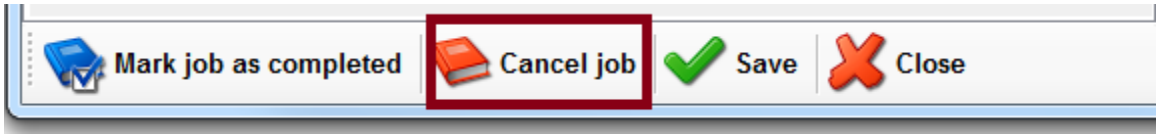
In-progress: How to cancel a job



There are three ways to cancel a job.

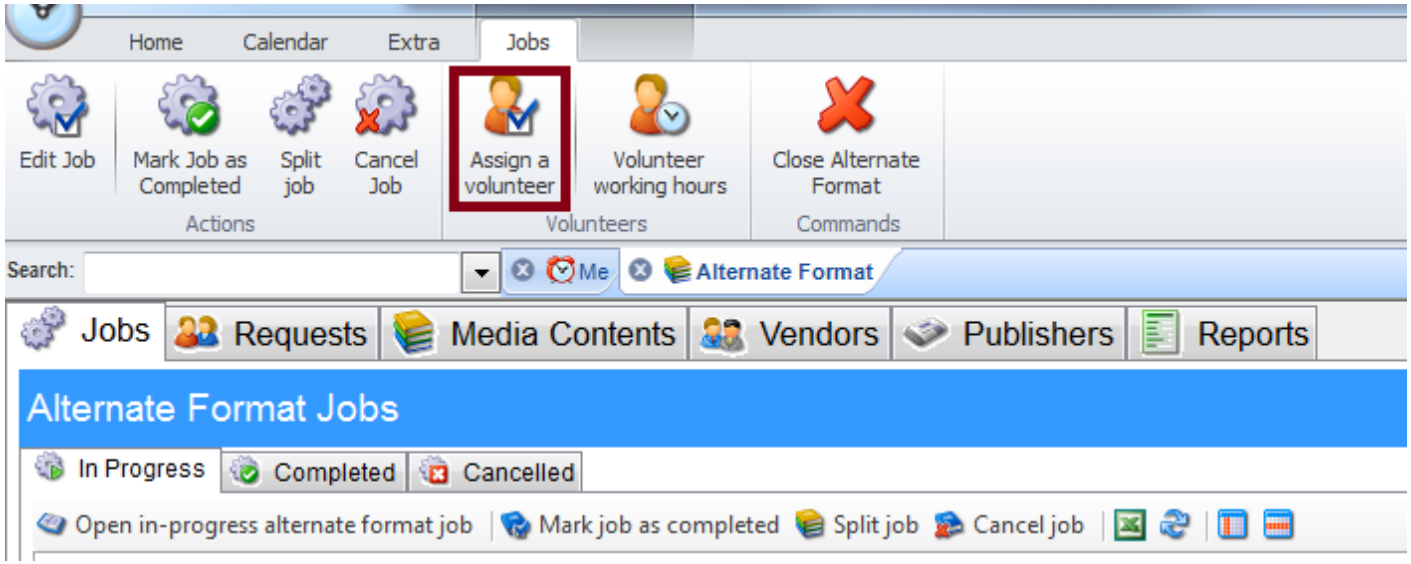
You can select it from the ribbon bar. See photo.

Or under the Jobs > In Progress tab > Cancel Job. See photo.

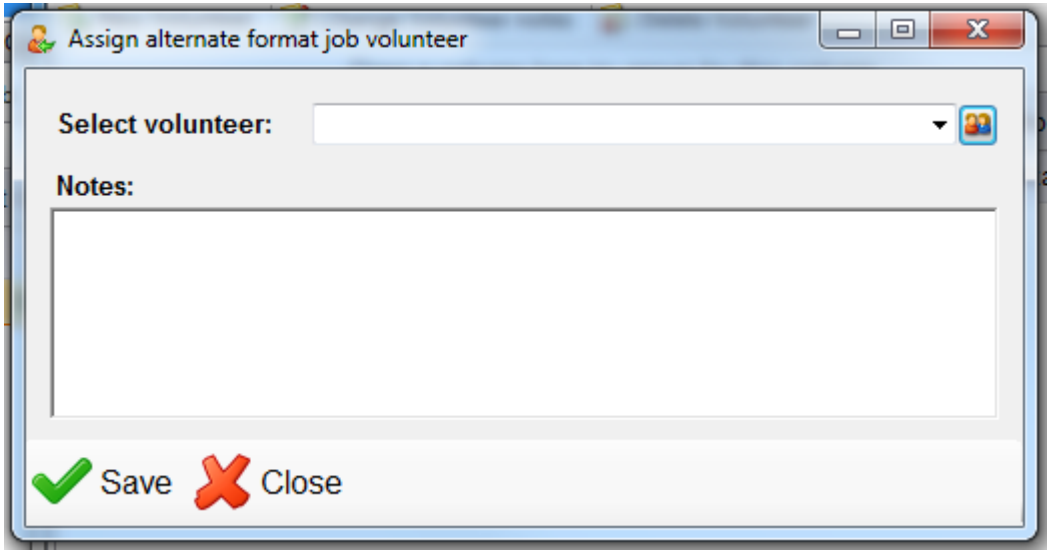


Also, when you open the job, there's an option at the bottom that says "Cancel Job".

In-progress: How to assign a volunteer



On the ribbon bar, there's a button to "Assign a volunteer". Click on it.

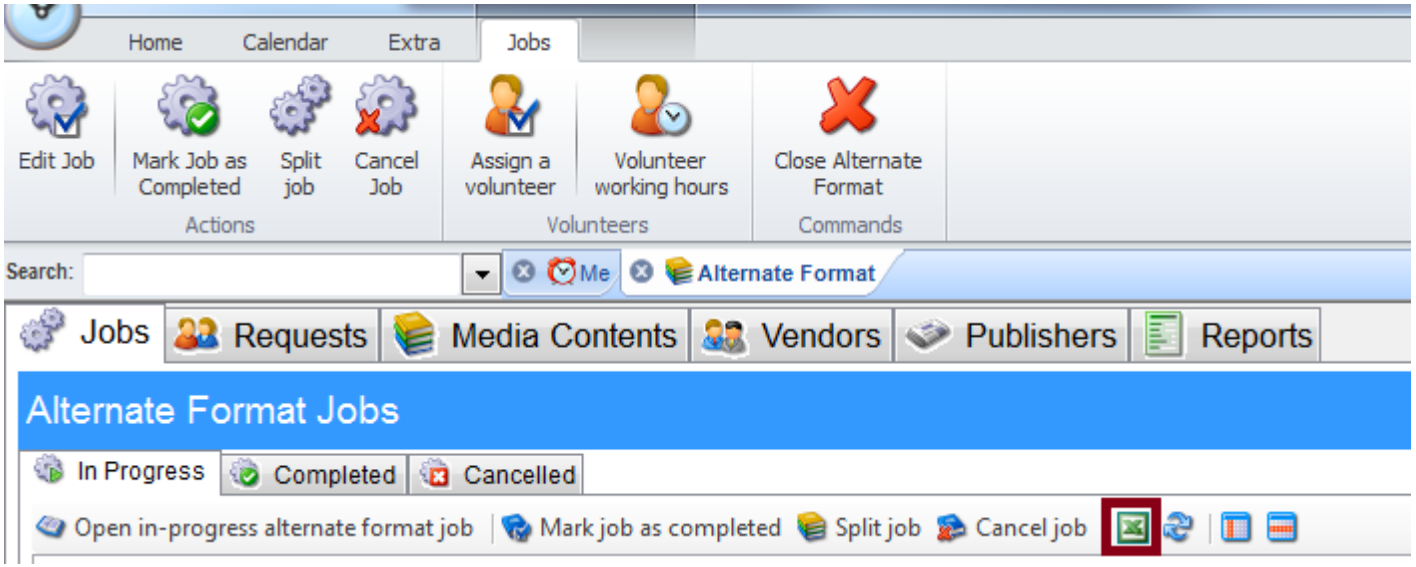


You should get a screen like this. It will have a drop-down menu, Notes, and a button where you can add the volunteers.

Click on the button on the right to add new volunteers in the list.

Or select from the drop-down menu.

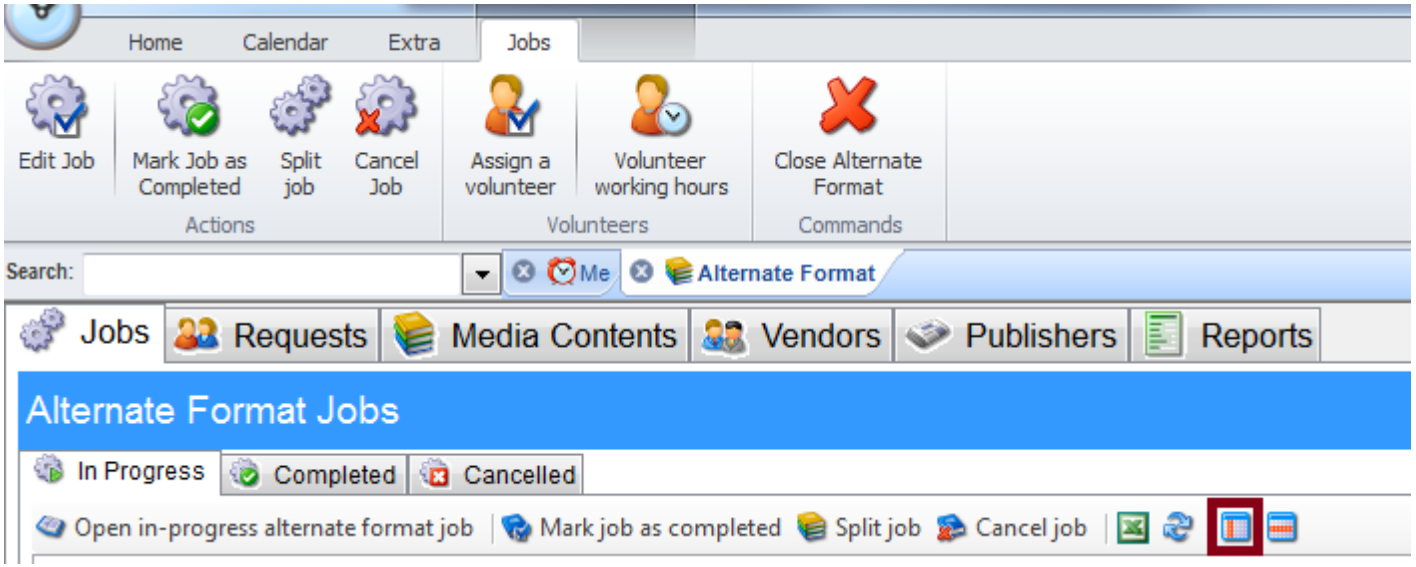
In-progress: How to export to Excel



To export the Jobs in-progress, go to Jobs > In Progress > Excel button

Or you can also right-click, and select “Export to Excel”

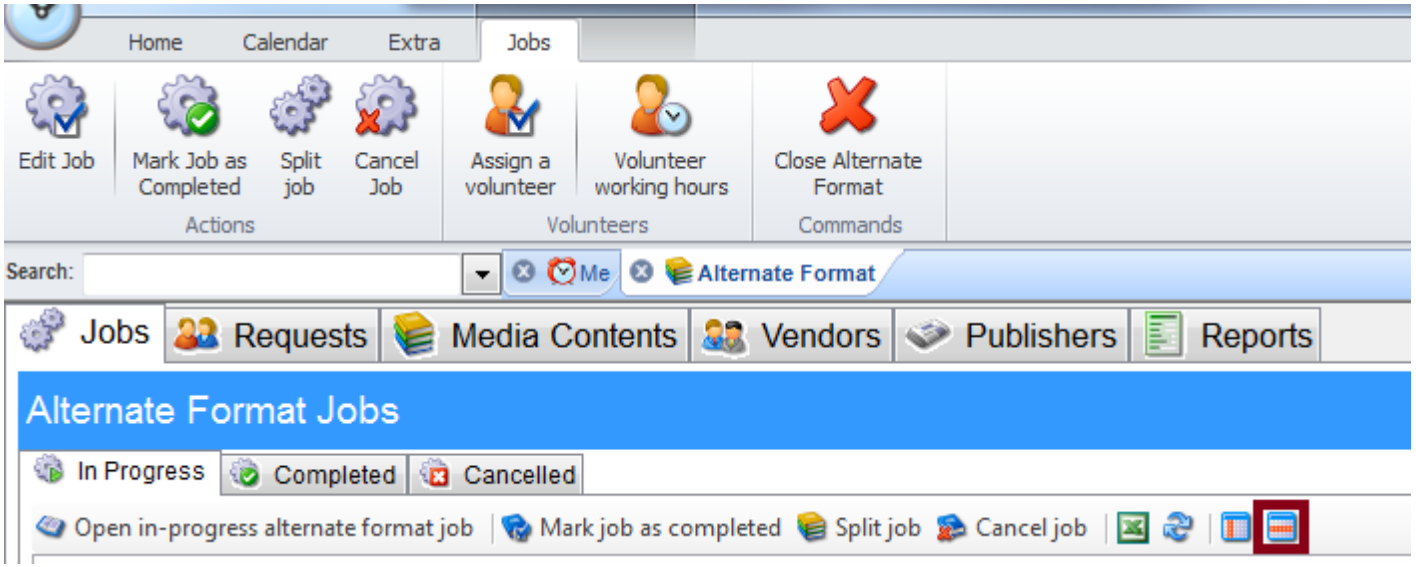
In-progress: How to Show/Hide Columns



To export the Jobs in-progress, go to Jobs > In Progress > button on the right. See photo.

Or you can also right-click, and select “Show/Hide Columns”

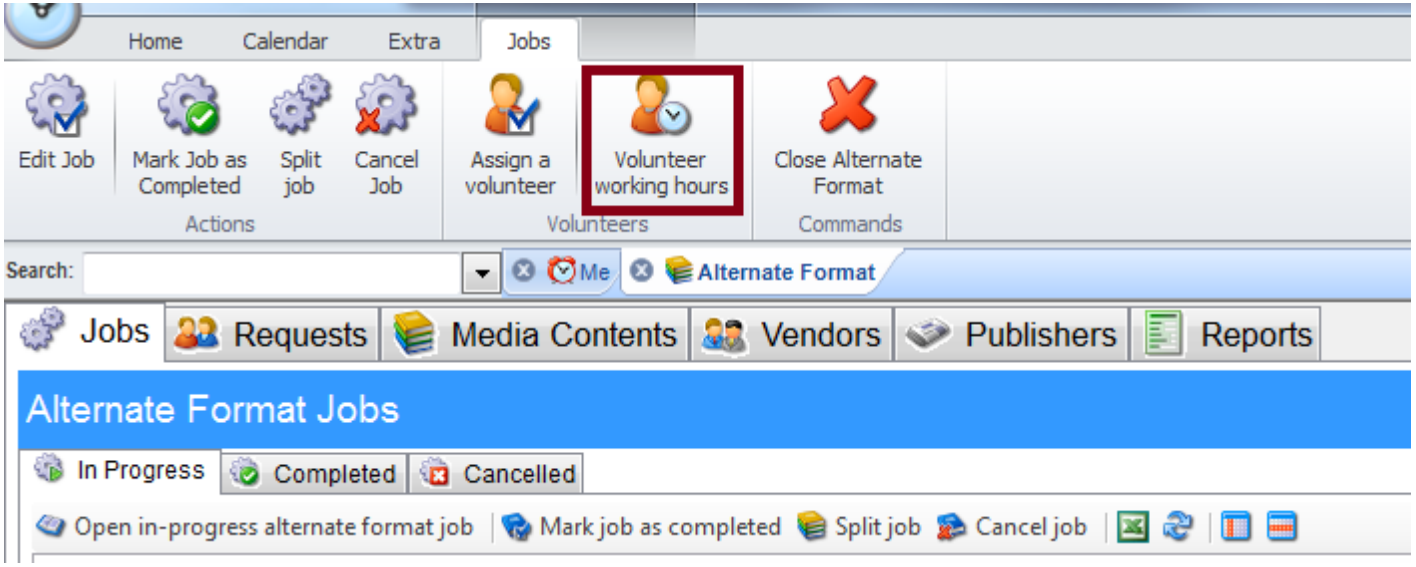
In-progress: How to add/remove row formatting



To export the Jobs in-progress, go to Jobs > In Progress > button on the right. See photo.

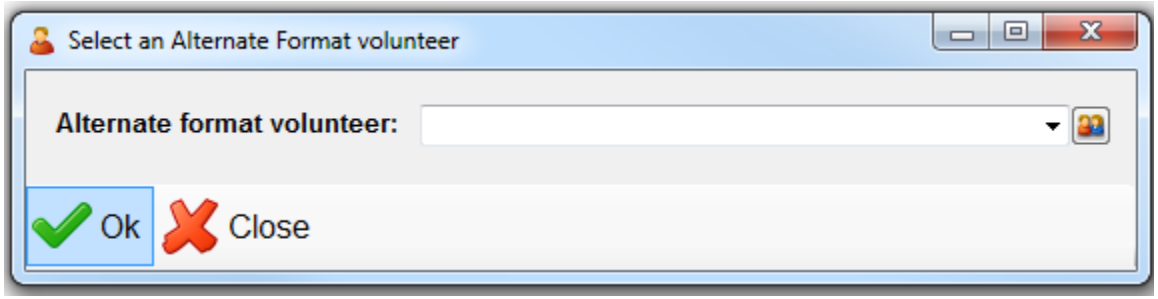
Or you can also right-click, and select “Show Row Formatting”

In-progress: How to manage volunteer working hours



Step 1: Go to the Jobs tab

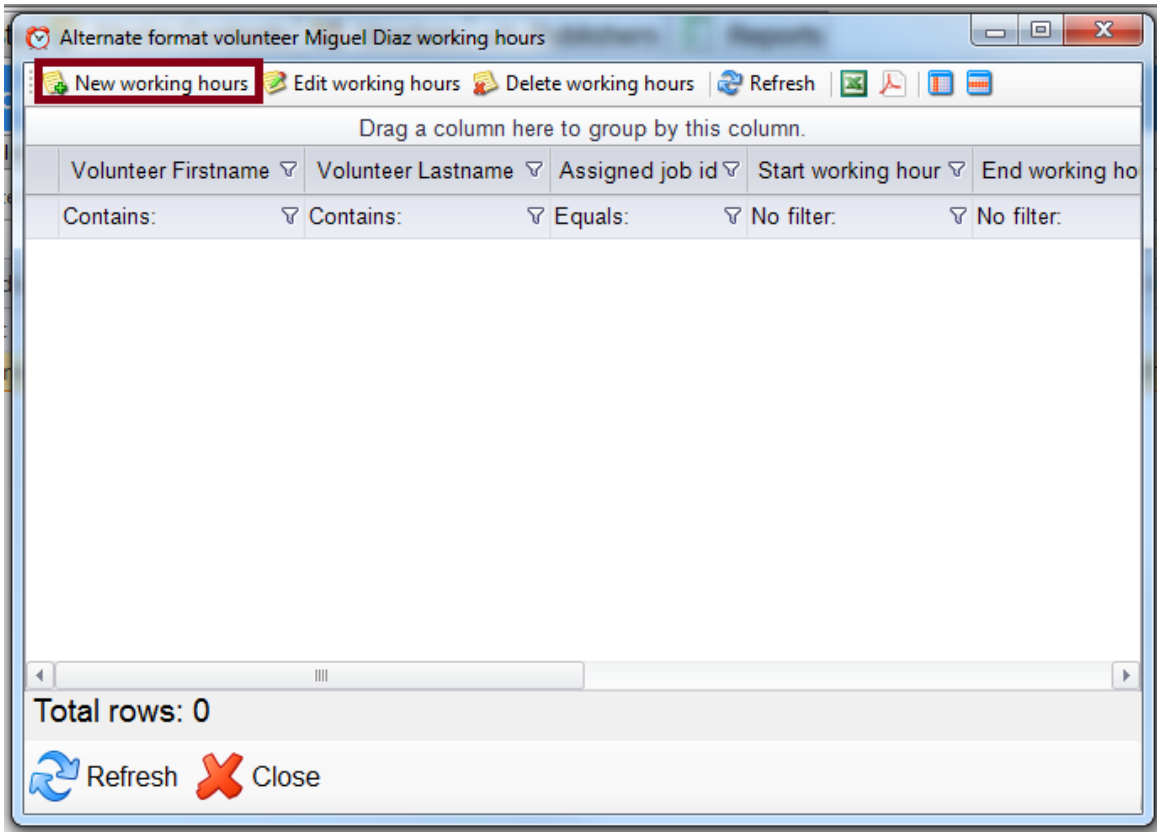
Step 2: On the ribbon bar, click on the “Volunteer Working Hours” button.



A pop-up box should appear after clicking the “Volunteer Working Hours” button.

It will have a drop down list for the volunteer’s name.

Or you can add the volunteer by clicking on the button on the right.

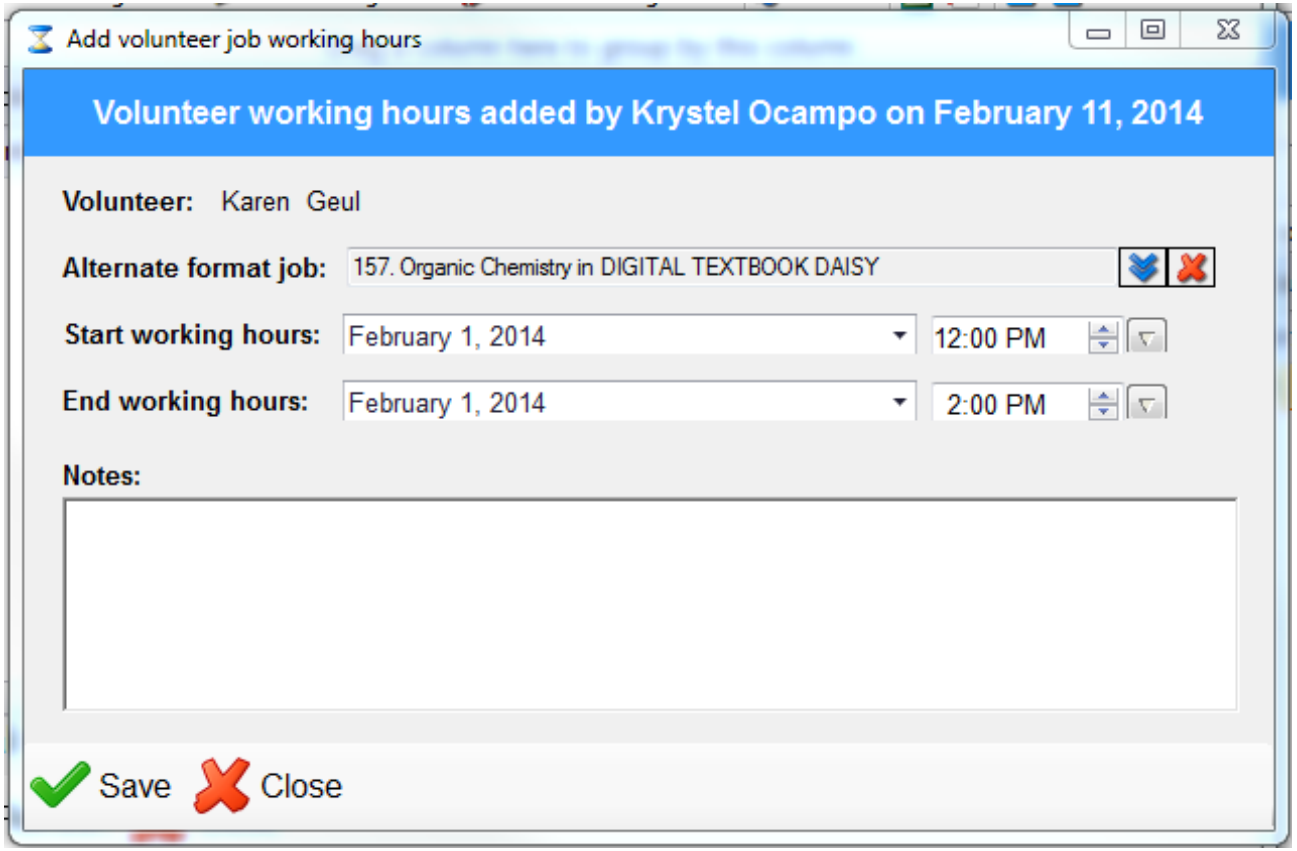


Volunteer working hours: New Working Hours

Once you select the volunteer, you will get a screen like this.

Click on “New working hours” to add their working hours.

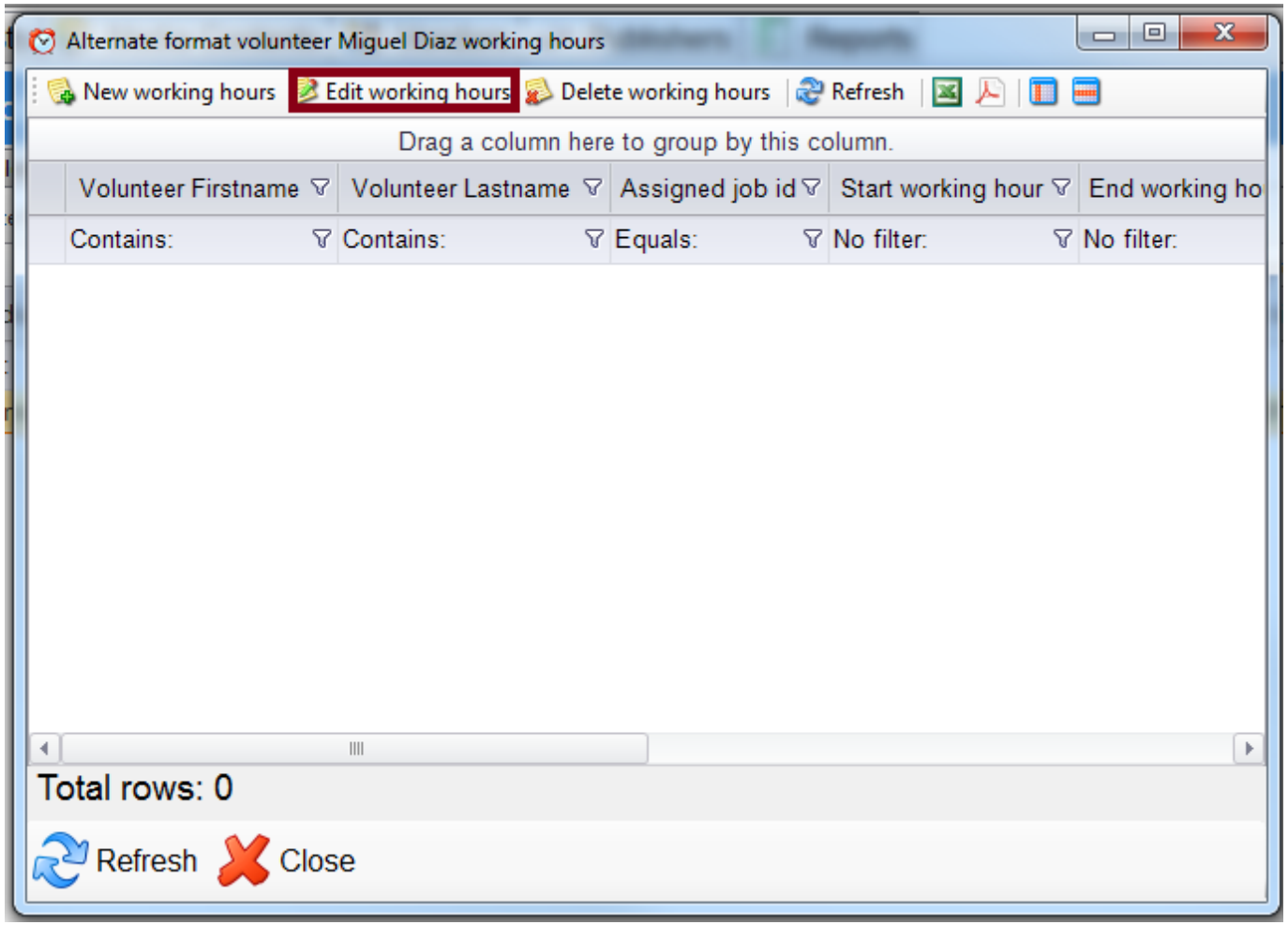
You can also right-click to add the working hours



Once you click on the "New working hours", you will get a screen like this.

Enter the volunteer working hours.

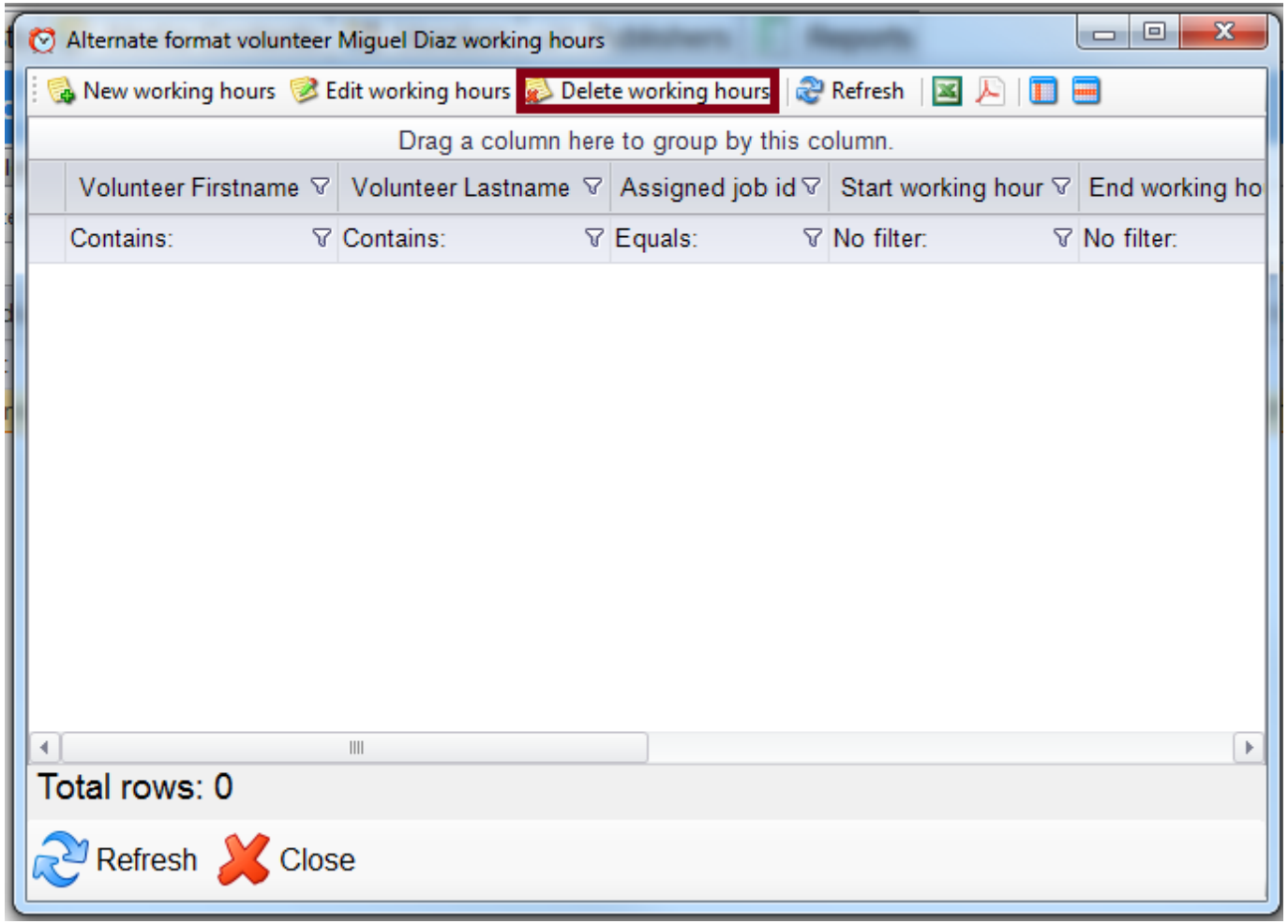
Volunteer working hours: Edit working hours



To edit the working hours, just select from one from the list and then click on “Edit working hours”

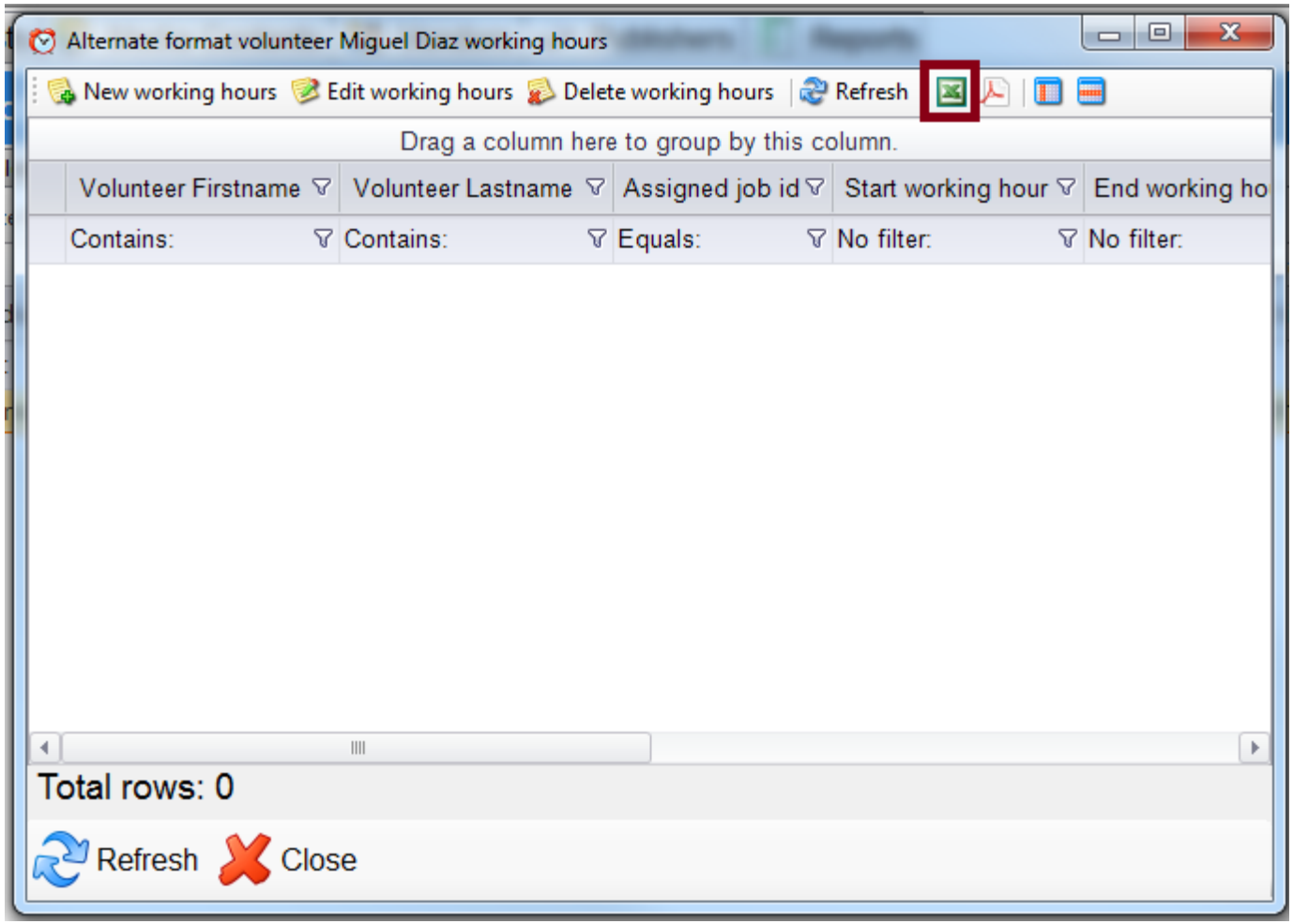
You can also right-click to edit the working hours.

Volunteer working hours: Delete working hours



To edit the working hours, just select from one from the list and then click on “Edit working hours”

You can also right-click to edit the working hours.

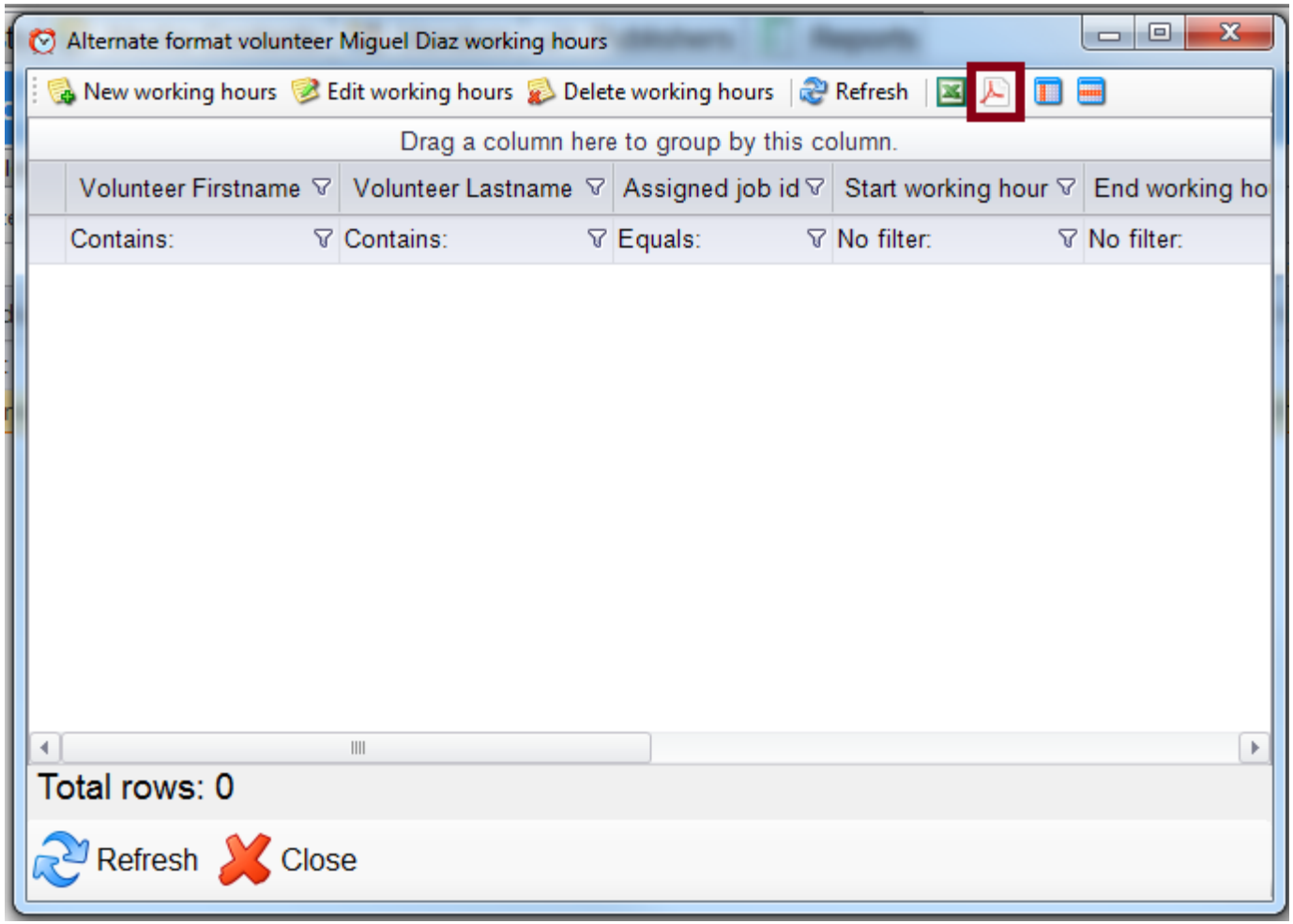


Volunteer working hours: Export to Excel

Step 1: Go to "Volunteer Working Hours"

Step 2: Select a volunteer

Step 3: Select the Excel Sheet button on the right.



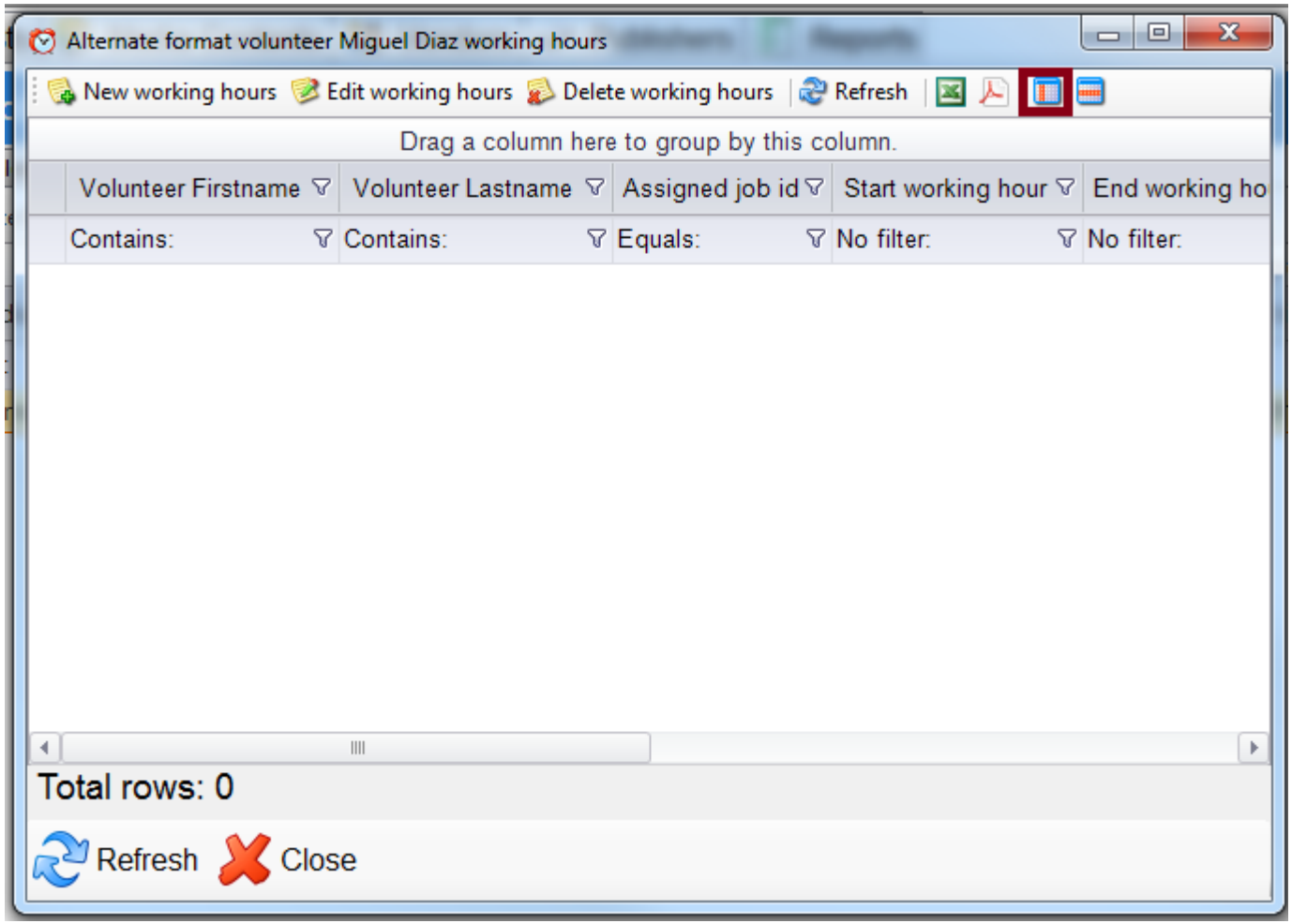
Volunteer working hours: Export to PDF

Step 1: Go to "Volunteer Working Hours"

Step 2: Select a volunteer

Step 3: Select the PDF button on the right.

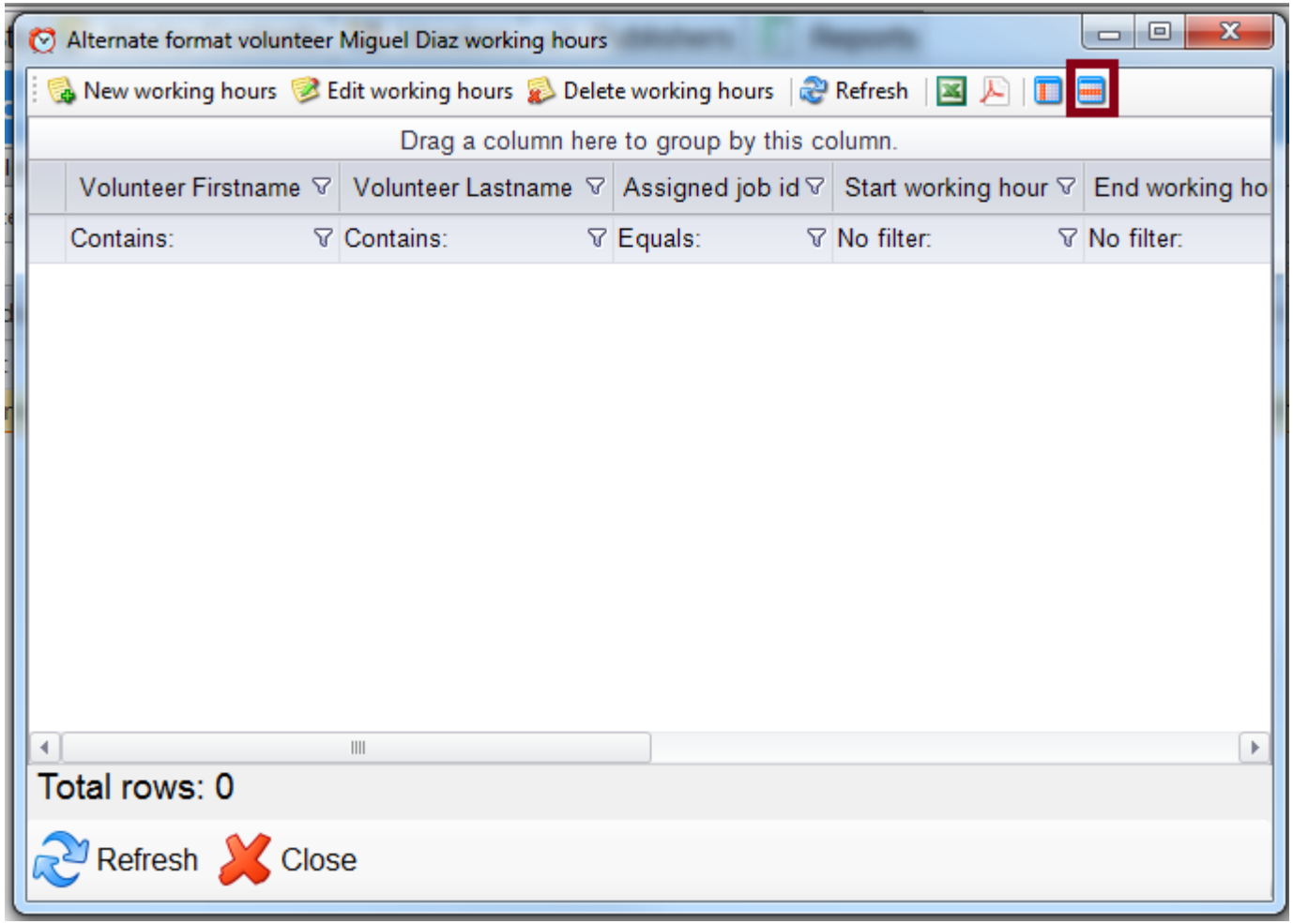
Volunteer working hours: Show/Hide Columns



Step 1: Go to "Volunteer Working Hours"

Step 2: Select a volunteer

Step 3: Select the button on the right. See photo.



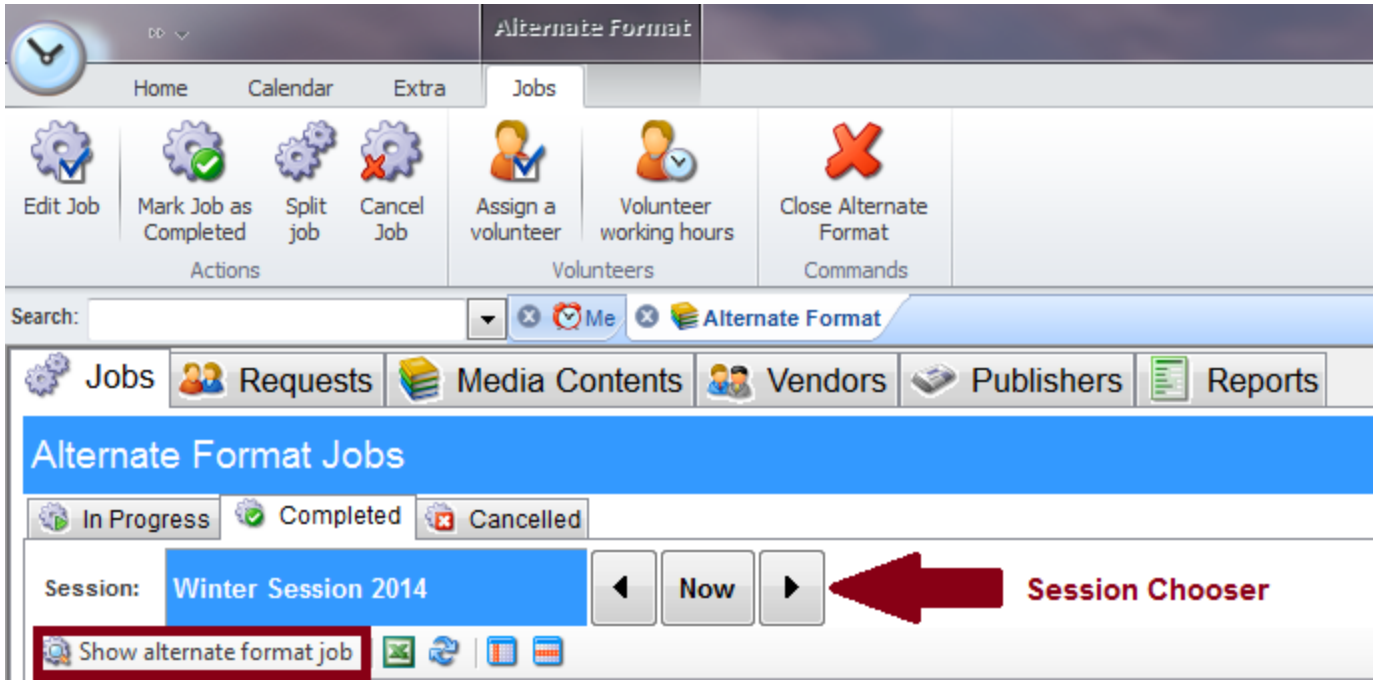
Volunteer working hours: Row Formattin g

Step 1: Go to “Volunteer Working Hours”

Step 2: Select a volunteer

Step 3: Select the button on the right. See photo.

Completed: How to open a job

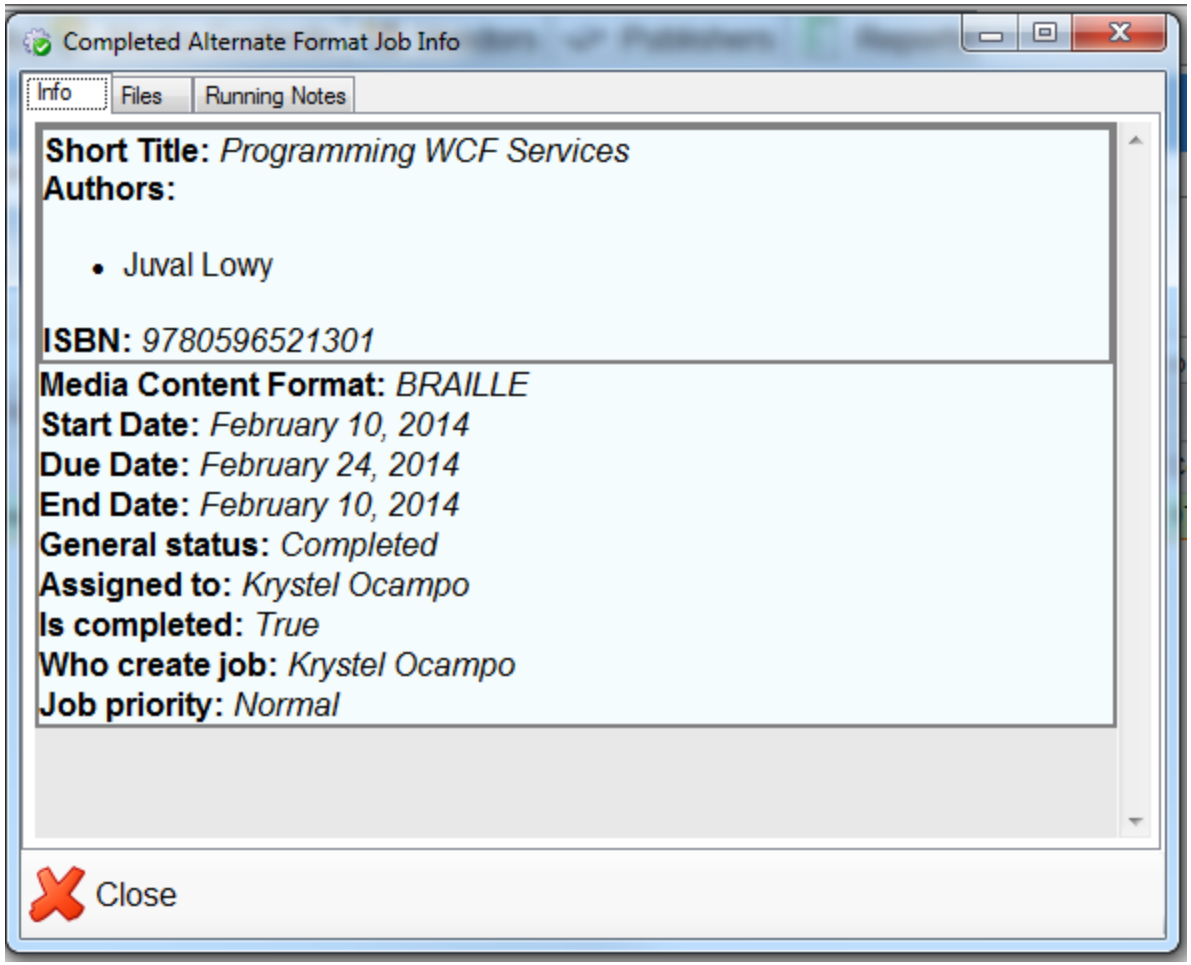


Step 1: Jobs > Completed

Step 2: Always make sure, you're in the right session.

Step 3: Click on "Show alternate format job"

You can also double-click on the selected job or right-click and select "Show alternate format job**"**

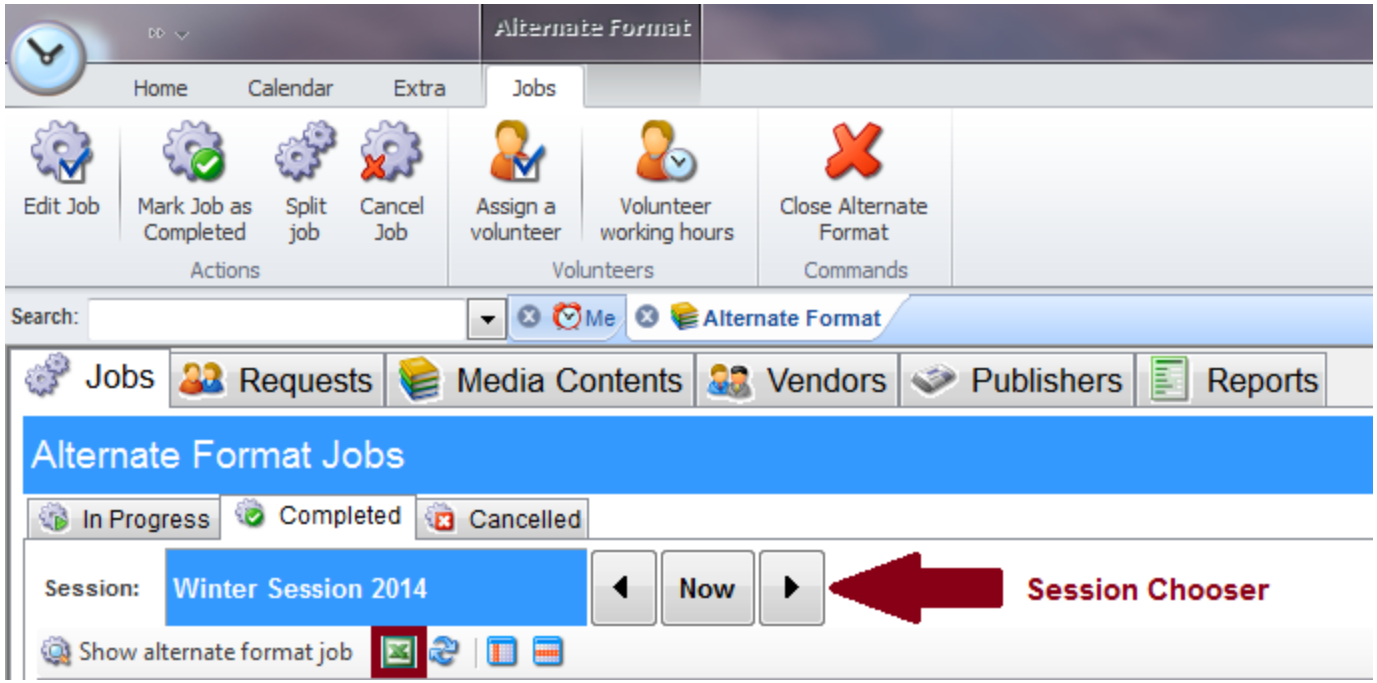


This is the screen that will pop-up when you open a completed job.

It'll have three tabs: Info, Files, and Running notes

You're not going to be able to edit any of this information. You can only download the file.

Completed: How to export to Excel



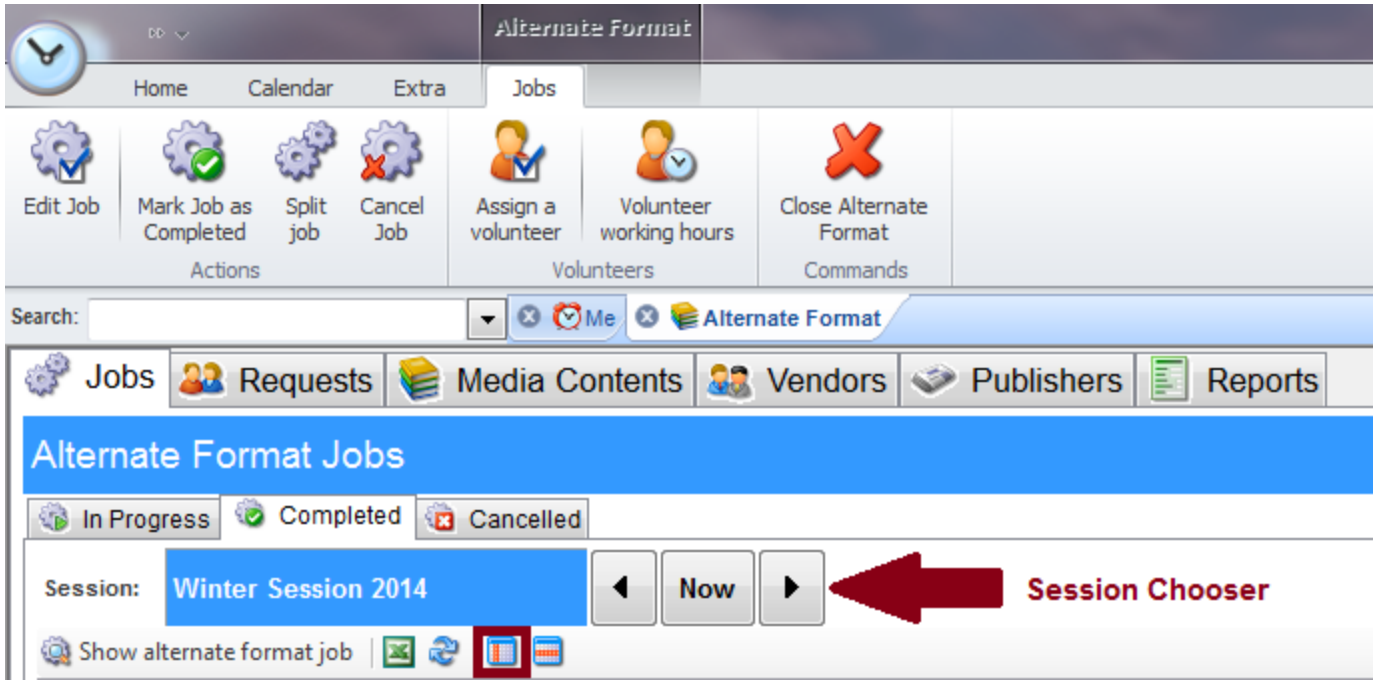
Step 1: Jobs > Completed

Step 2: Always make sure, you're in the right session.

Step 3: Click on the Excel button

You can also double-click on the selected job or right-click and select "Export to Excel"

Completed: How to Show/Hide Columns



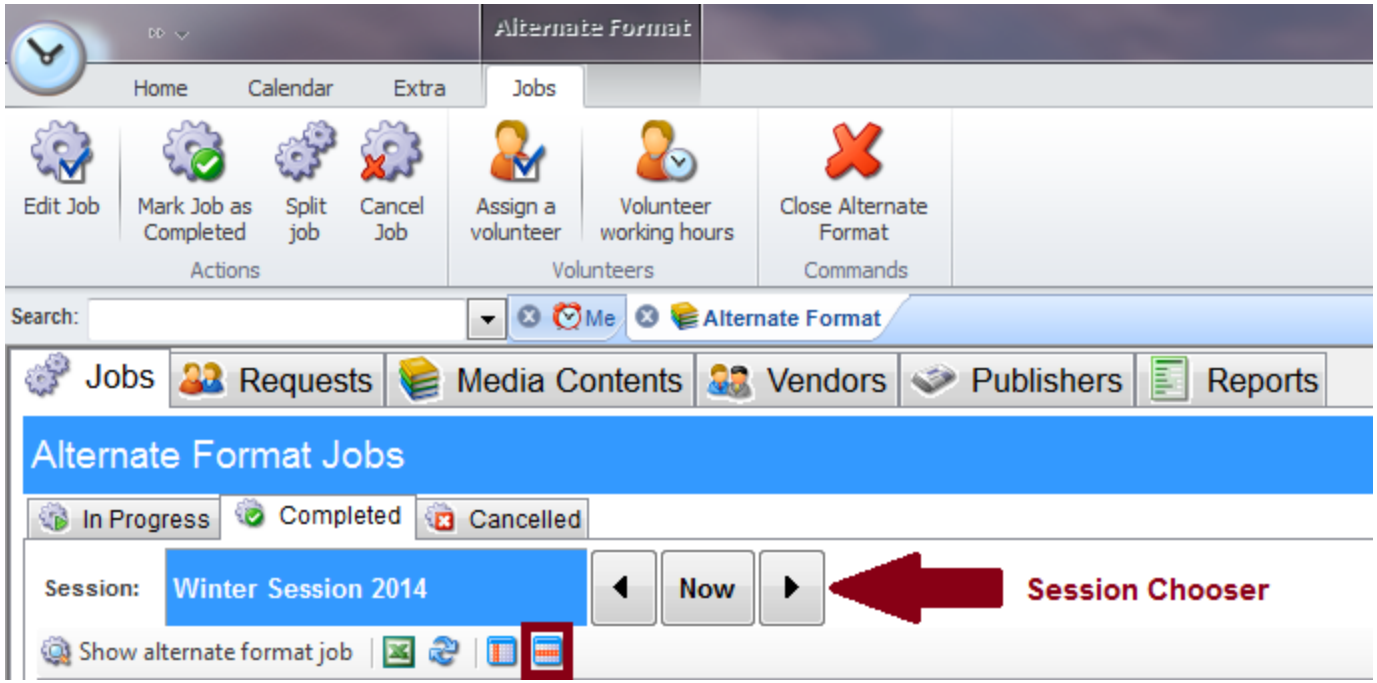
Step 1: Jobs > Completed

Step 2: Always make sure, you're in the right session.

Step 3: Click on the button on the right. See photo.

You can also double-click on the selected job or right-click and select "Show/Hide Columns"

Completed: How to add/remove row formatting



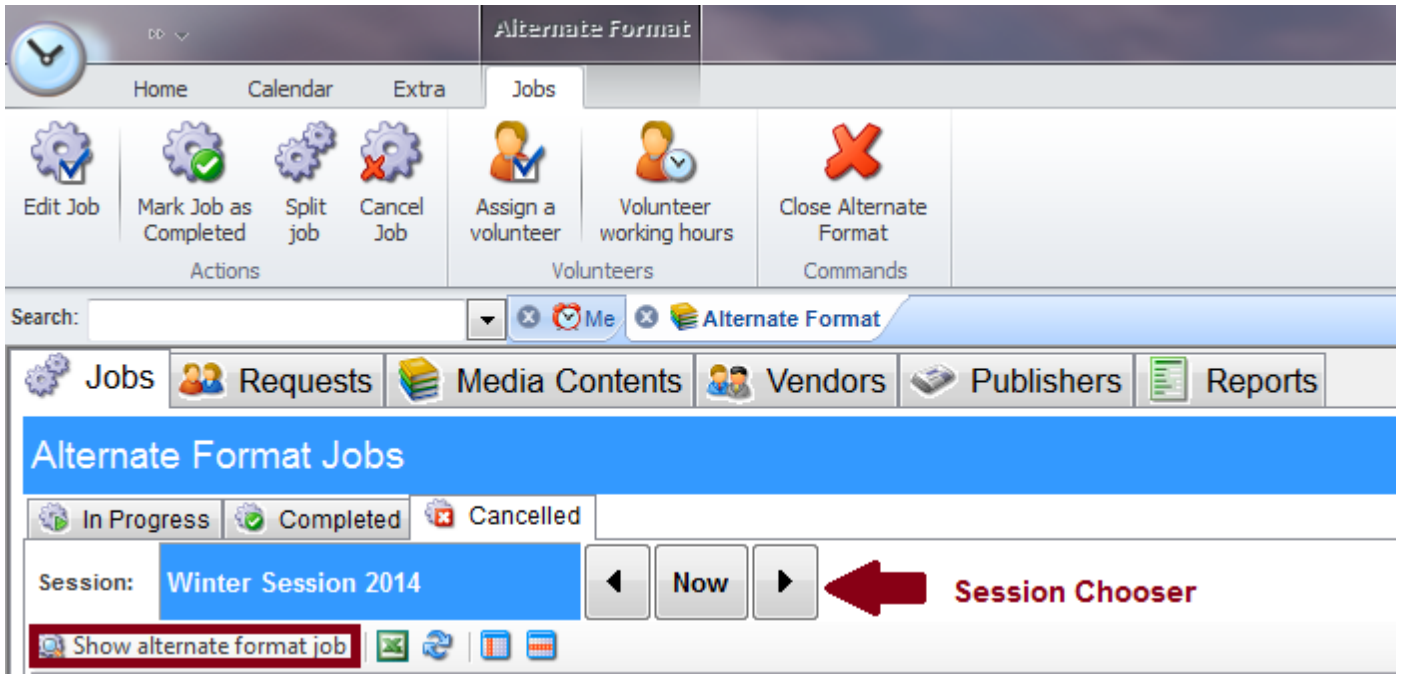
Step 1: Jobs > Completed

Step 2: Always make sure, you're in the right session.

Step 3: Click on the button on the right. See photo.

You can also double-click on the selected job or right-click and select "Show Row Formatting"

Cancelled: How to open a job



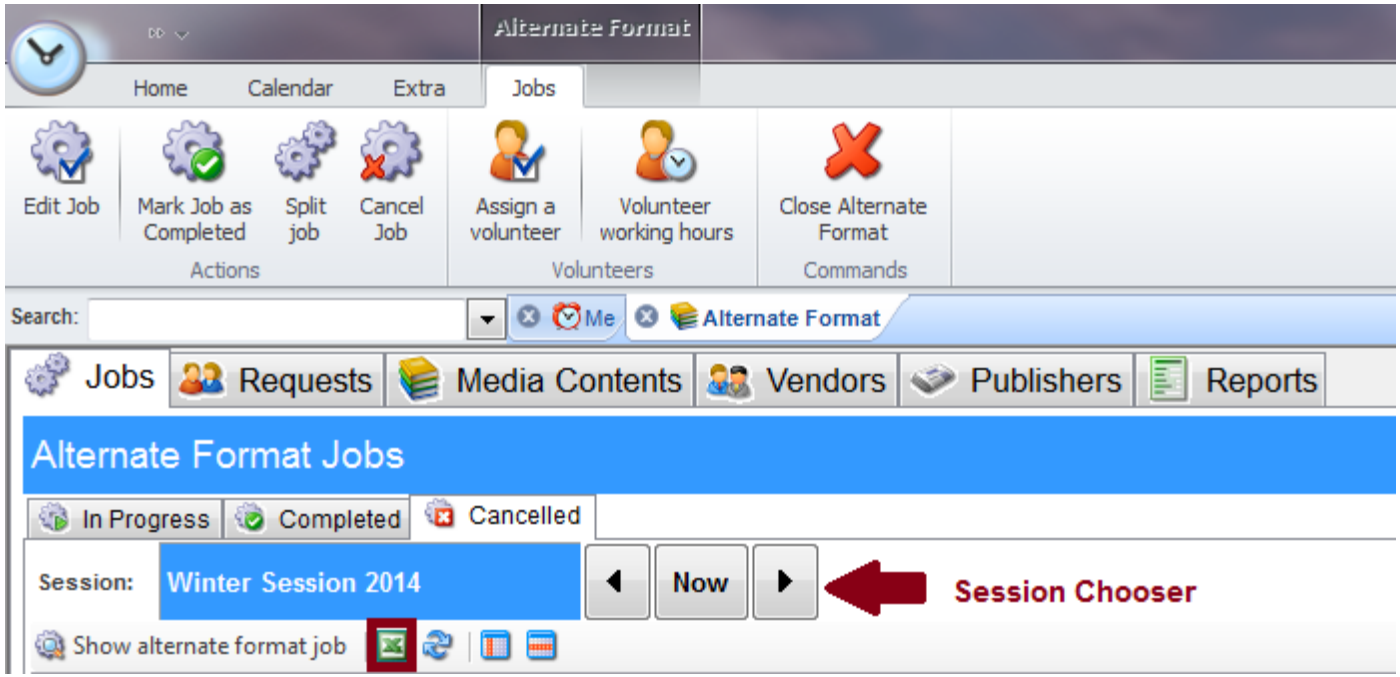
Step 1: Jobs > Cancelled

Step 2: Always make sure, you're in the right session.

Step 3: Click on "Show alternate format job"

You can also double-click on the selected job or right-click and select “Show alternate format job”

Cancelled: How to export to Excel

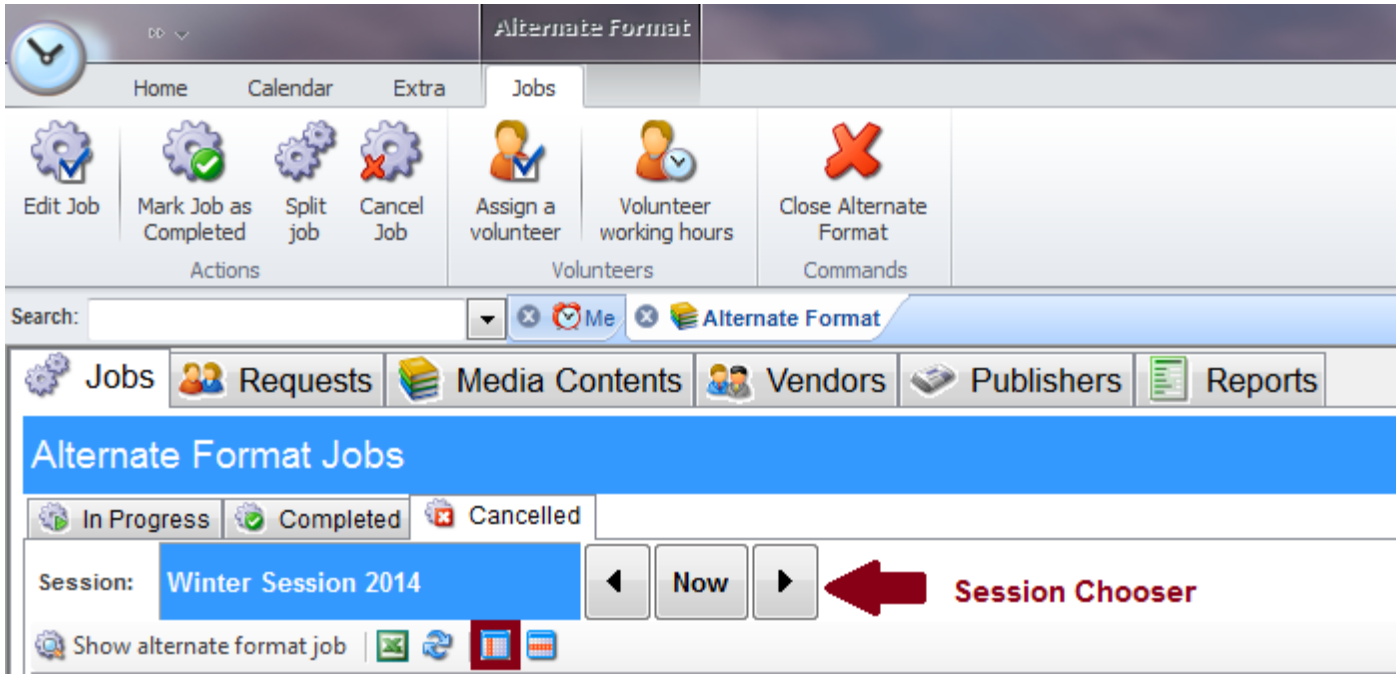


Step 1: Jobs > Cancelled

Step 2: Always make sure, you're in the right session.

Step 3: Click on the Excel button.

Cancelled: How to Show/Hide Columns

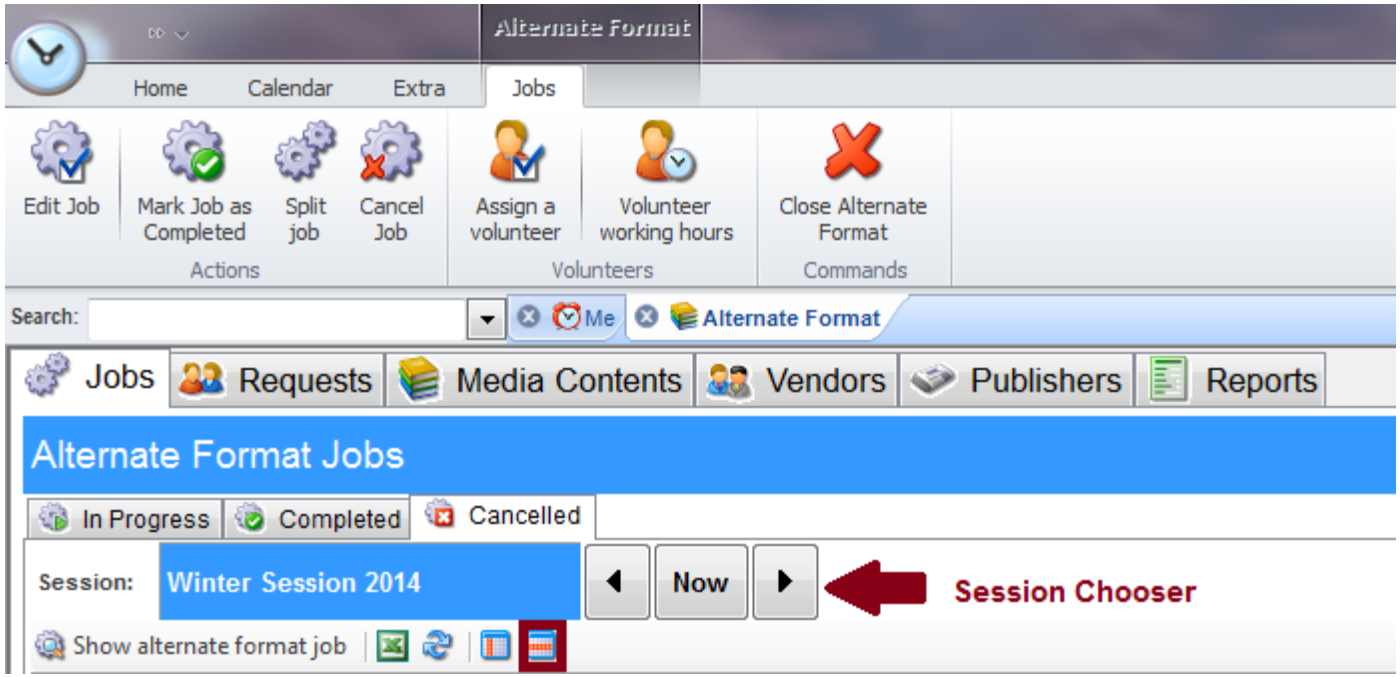


Step 1: Jobs > Cancelled

Step 2: Always make sure, you're in the right session.

Step 3: Click on the button on the right. See photo.

Cancelled: How to add/remove row formatting

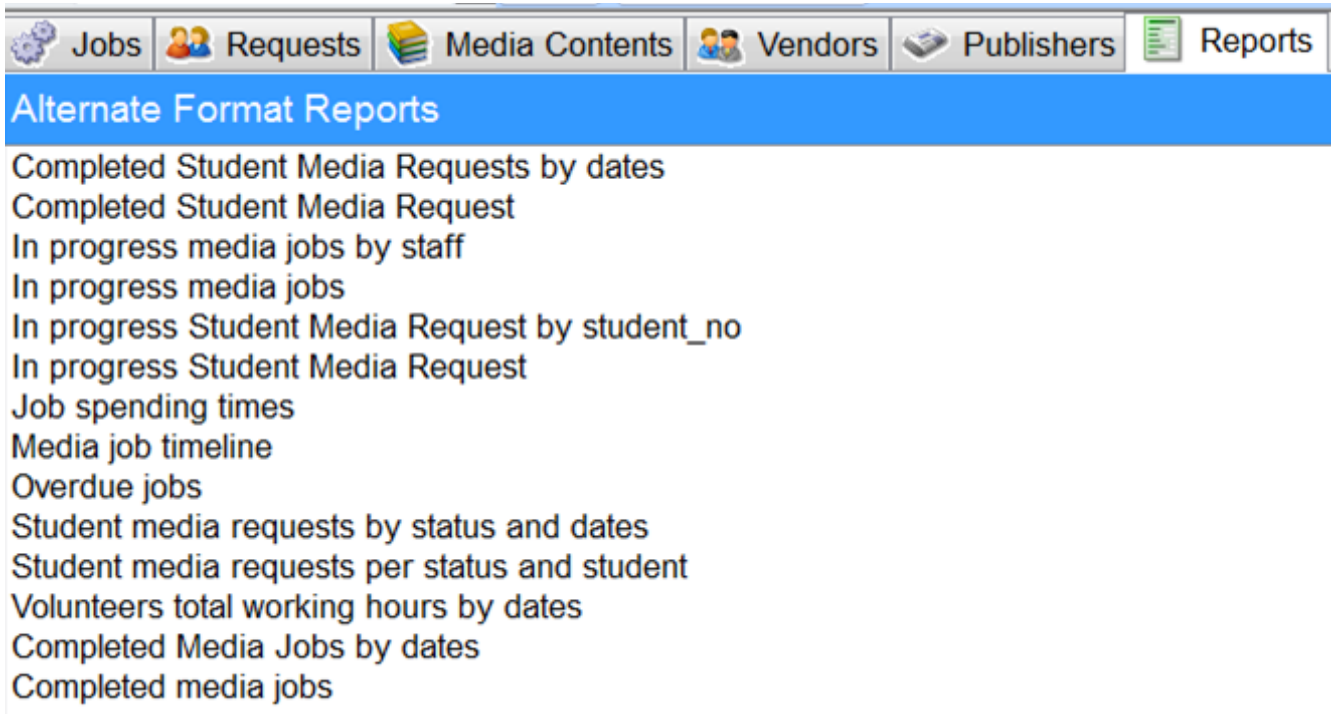


Step 1: Jobs > Cancelled

Step 2: Always make sure, you're in the right session.

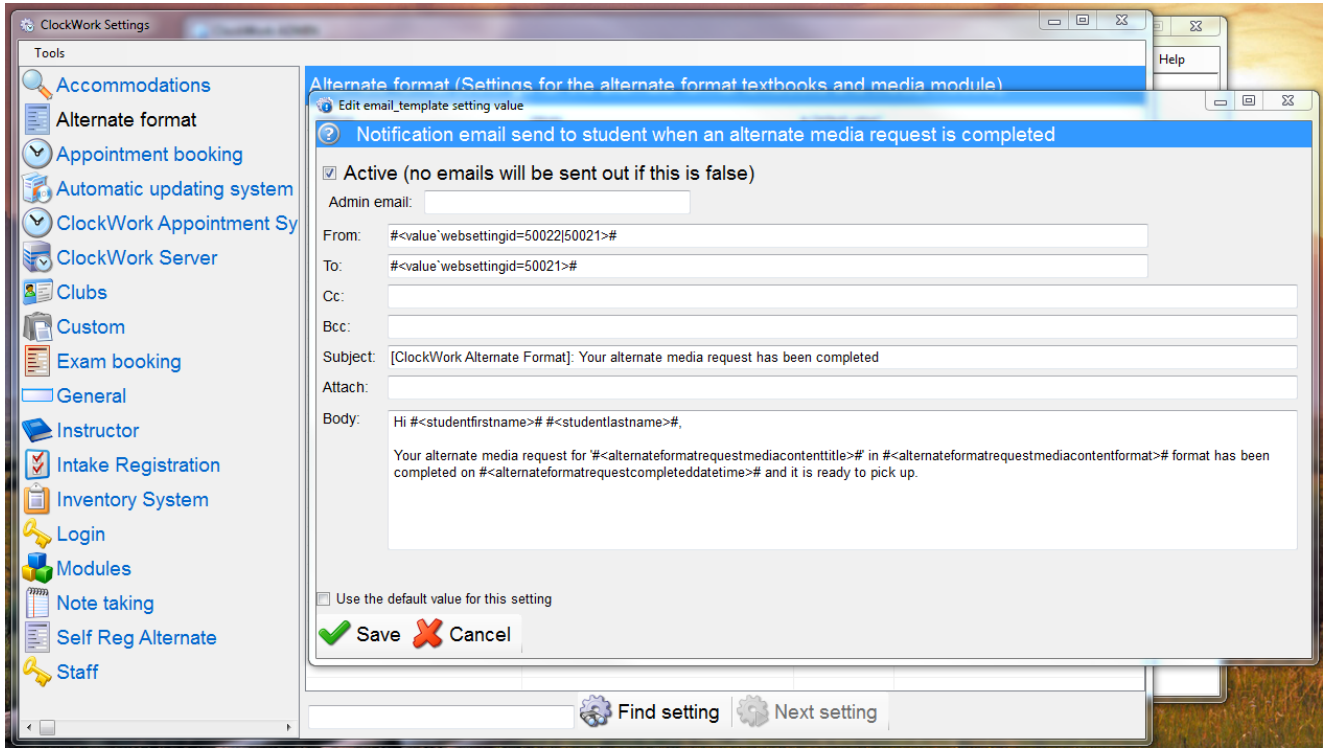
Step 3: Click on the button on the right. See photo.

REPORTS


Jobs
Requests
Media Contents
Vendors
Publishers
Reports
Alternate Format Reports
Completed Student Media Requests by dates
Completed Student Media Request
In progress media jobs by staff
In progress media jobs
In progress Student Media Request by student_no
In progress Student Media Request
Job spending times
Media job timeline
Overdue jobs
Student media requests by status and dates
Student media requests per status and student
Volunteers total working hours by dates
Completed Media Jobs by dates
Completed media jobs

ADMIN

How to change the notification sent to students when a request is completed.



Go to: ClockWork Admin > Settings > Web module settings > Alternate Format > Emails > Notification email send to student when an alternate media request is completed

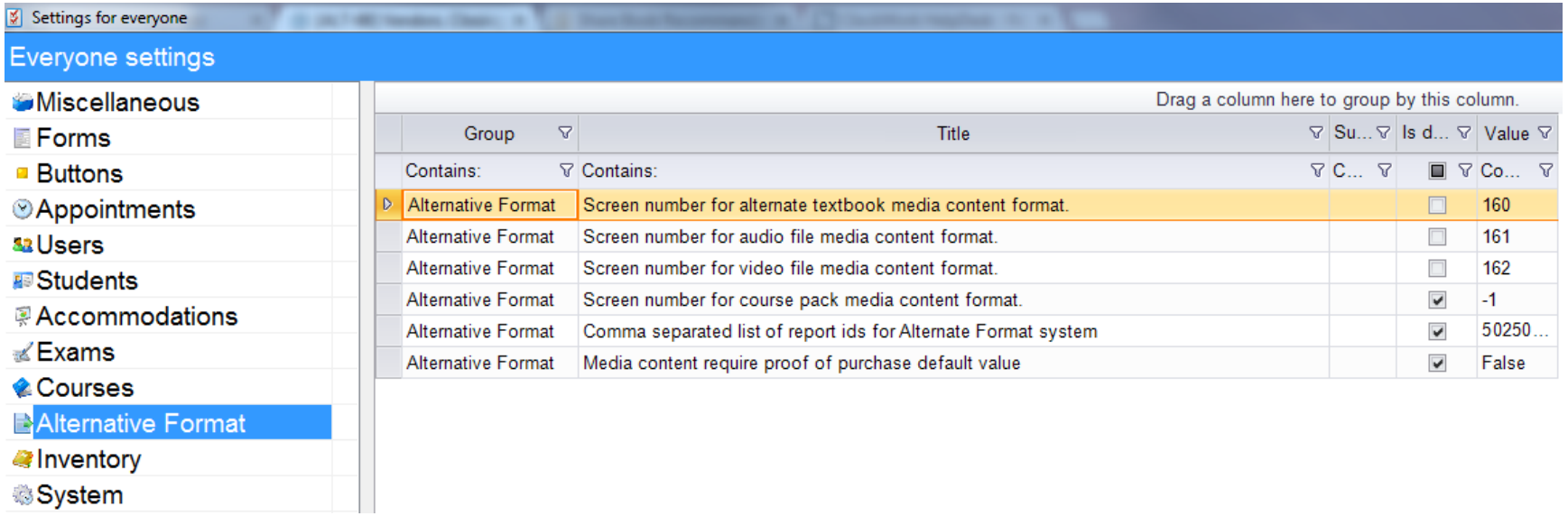
How to attach dynamic forms to a category.

Step 1: Create a form

Go to: Admin > Data Forms > Manage Data Forms > Create new form > Alt Format Content

Step 2: Attach the forms you've just created to the following settings

Go to: Admin > Settings > ClockWork Main Settings > Alternative Format



FAQ

1. How to add Proof of Purchase
   To add a proof of purchase, go to

2. How to add alternate format files
   To add alternate format files, go to the Media Content tab, open a

3. How to add volunteers

4. How to add volunteer notes