

ClockWork Text Calendar Training Guide and Reference

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ClockWork Text Calendar Training Guide

Overview

This purpose of this training guide is to provide an overview of the core functionality of the ClockWork software with an emphasis on keyboard navigation and usage of the text based calendar. The core functionalities this guide addresses are:

- Calendar (navigating the calendar and appointment creation and editing)
- Entering appointment notes and points of contact for a student
- Searching for a student
- Viewing and editing student information on the intake / registration form
- Viewing the history of student notes and points of contact
- Viewing and editing student disability information
- Viewing and editing student accommodation information
- Generating accommodation letters
- Viewing a student's course registrations

Basic keyboard navigation

The following keyboard commands are general and available from most areas in ClockWork:

1. [Control + O] This will call up a list of keyboard commands available on the current screen. The list will be different depending on the current active screen.
2. [Alt + S] This will save or select from the current screen if a save or select command is available. For example, if the student's accommodation form is currently selected Alt + S will save and close the form.
3. [Alt + C] Same as above, but will close or cancel the current screen. For example, if the student's accommodations form is currently selected Alt + C will close the form. If you have made any changes without saving, ClockWork will prompt you to confirm the cancel and lose your changes.
4. [F11] This will bring up a search box that can be used to find a student. You are able to type in part of a student first name, last name, or student number, and then press the <enter> key to initiate the search. ClockWork will display a popup box with the search results, which may include no matches, a single match, or multiple matches. You can use the cursor up, down, left and right keys to navigate the search results list, and pressing the <enter> key will select the student that is currently focused.
5. [Alt] This will move focus to the main menu. Cursor left and right will move between the main categories, cursor down and up will move between the available functions in the currently selected category. Pressing <enter> will execute the currently selected

function. Pressing Alt again will move focus away from the main menu and back to ClockWork.

6. [Tab] and [Shift + Tab] Will navigate forward and backward between the controls on the screen.
7. [Control + Tab] This will switch between the available windows that are open inside of ClockWork. For example, if you open a New Student screen and want to switch back to your calendar without closing the New Student screen, you can press Control + tab. Pressing Control + tab again will switch back to the New Student screen.

Keyboard navigation for specialized controls

There are two main specialized controls that ClockWork contains which use an enhanced keyboard navigation scheme:

1. Tab Control. Once a tab control has focus you can switch between tab pages by using the cursor left and right keys. Pressing the tab key will move focus to the first control within the currently selected tab page. Pressing shift+tab while the first control on the tab page is selected will move focus back to the tab control.
2. Toolbar. The toolbar contains buttons that provide additional functionality for the screen. You will know a tool bar is focused if using a screen reader because the speech will announce the word "toolbar". Once in a toolbar the functionality works the same as a tab control. You can use the left and right cursor keys to move between the various buttons that are contained in the toolbar. Pressing the tab key will move focus to the next control after the toolbar.

Navigating the calendar

When you start up ClockWork and login you will land on the calendar by default. The calendar controls are available by pressing Control + O on the main calendar screen. The basic navigation keys are cursor left and right to move forward and backward between the days of the week, and cursor up and down to move between the appointments on the current day. If no appointments are entered on the currently selected day there will be a single non-editable entry in the day list indicating that there are no appointments yet entered for this date. Pressing the Home key on the keyboard will always go to today's date, and pressing Control + G will open a popup allowing you to select a date to jump to.

Viewing another person's calendar

Pressing Alt + V will open a popup with a drop list of staff names you are allowed to view

calendars for. Use Control + Cursor Down to open the drop list and then cursor keys to navigate the names in the list. Pressing the Enter key will select the currently focused name. Navigating the other users calendar is the same as navigating your own. To switch back to your own calendar at any point press Alt + B, or navigate to the toolbar using the Tab key and select the “Back to me” button.

Creating an appointment

To create a new appointment first navigate to the day you would like to book the appointment for, and then press Control + N. The appointment edit screen will pop up and focus will be on the tab control. The tab control has three tabs: Appointment (Alt + P), Multiple bookings (Alt + M), and Notes (Alt + N). The first tab has the basic appointment details such as date, time, duration, title, attendees. The second tab contains options for booking recurring appointments (this is optional). The third tab contains the session notes for the student for this appointment.

Note that you are always added to the attendees list automatically for each appointment you book. So if you are booking an appointment for someone else that you will not be attending, you should remove your name and add the other attendee(s) names. Use the tab key to navigate the various appointment details and press Alt + S when you have finished in order to book the appointment. Or press Alt + C if you wish to cancel this operation.

There are two drop lists available for adding attendees to the list. The first contains student names and the second contains staff names. To select a student, navigate to the student drop list and start typing the last name of the student. The drop list will automatically start to match up with the names in the list and you should be able to press the Enter key after typing a few letters to select the student. The same procedure can be used in the staff droplist to select another staff name to add to the list. To remove an attendee from the list, navigate to the attendees listing and focus the attendee you wish to remove, then press the delete key.

Editing an existing appointment

To edit an existing appointment, focus the appointment on the main calendar using the cursor keys and then press the Enter key. This will popup the appointment edit box that was outlined in the previous section. Press Alt + S to save your changes once you are finished.

There are some quick editing functions available from the main calendar without having to go into the popup appointment edit box. To cancel an appointment press Alt + L. Press Alt + L on a cancelled appointment to un-cancel it. To mark a student as a no-show press Alt + N.

Deleting an existing appointment

To delete an existing appointment, focus the appointment on the main calendar using the cursor keys and then press the Delete key. ClockWork will prompt you to confirm the appointment delete. Once an appointment has been deleted it cannot be recovered through the user interface. If you have deleted an appointment by accident and require this to be recovered (for example, you had entered session notes for the student and are not able to re-book and re-enter the notes), please submit a support ticket at <http://support.tpro.ca>. One of support staff will contact you and recover the appointment for you.

Creating recurring appointments

Recurring appointments in ClockWork are slightly different than other calendar systems. In ClockWork, a recurring appointment set is a group of appointments that linked together. This means that although you can enter a rule to create the set, the rule is not necessary and there does not have to be a defined relationship between appointments in a recurring set. For example, I could have three appointments in a recurring set that are all on different days and different times. The three appointments might have the same student, but you are able to mark no-show status and enter session notes independently for each appointment in the set. In fact this is exactly why ClockWork handles recurring appointments a little differently. This also means that each appointment in a recurring set is available for reporting. So if you were to book a set of three appointments for a student in the future, each of those appointments would count as individual appointments in the reports.

To create a recurring appointment you should start by creating a single appointment for the first day in the recurring set. Here are the steps for creating a simple recurring set of appointments that will book three appointments for a student:

1. Navigate to the first appointment date you wish to create for the student and press Control + N to create a new appointment
2. Adjust the start and end times and select an appointment type. Add the student to the attendees list.
3. Press Alt + M to move to the recurring information tab. Alternately you can use Tab to navigate to the tab control and cursor right to the Multiple Bookings tab.
4. Press tab to move to the first control on the recurring information tab. This is the "Add dates" button. A date picker will appear and you can choose the second date for the student. Select the date and press the Enter key.
5. Your focus will now be on the Recurring dates list and on the date you just entered. To enter another date either Shift-Tab back up to the "Add dates" button, or press Alt + A to click the "Add dates" button. Enter the third date and press enter.
6. Press Alt + S to save the appointment.

To create a more advanced or larger recurring set you may wish to use the recurrence rule editor in ClockWork. Here are the steps to book 10 appointments for a student, one every other week on Wednesday:

1. Navigate to the first appointment date you wish to create for the student and press Control + N to create a new appointment
2. Adjust the start and end times and select an appointment type. Add the student to the attendees list.
3. Press Alt + M to move to the recurring information tab. Alternately you can use Tab to navigate to the tab control and cursor right to the Multiple Bookings tab.
4. Press tab until you hit the "Recurrence grouping" section. The default option is "Weekly", which is what you want for this example. If you wanted to switch to daily, monthly, or yearly for another appointment you can use the cursor up and down keys to navigate between the options.
5. Press tab again to land on the "Weekly frequency" text area. The default is 1, which means the appointment will be scheduled every week. For this example we are creating an every other week rule, so change this to 2.
6. Press tab again until you hit Wednesday and check Wednesday.
7. Press tab until you hit "Date range grouping". This is the start and end date of the range you want to book appointments for. To book 10 appointments, one every other week, you should set the start date to the current date and the end date to 20 weeks from today. Press Alt + G to generate the dates based on the rule and add them to the list. Your focus will move to the list of dates so that you can review what has been done. Note that you can press the Enter key on any date in order to modify the date or time for that particular appointment. You can also press the Delete key on any date to remove it from the list.
8. Press Alt + S to save the appointment.

[Entering appointment session notes for a student](#)

To enter session notes, first navigate to the appointment on the main calendar screen. Press Enter to open the appointment edit box. Press Alt + N to switch to the Notes tab (or you can tab twice to the Notes tab). Press Tab once to move to the first control on the Notes form, which is usually a notes edit box where you can type your session notes. Each school customizes their notes form so you can use the Tab key to explore the various options that have been configured for your department. It's very easy to change the ordering of the controls on the form, or to provide custom keyboard shortcuts. So if you would like a change please let your administrator know. Once you are finished entering your notes you can press Alt + S to save the appointment notes. You can repeat this procedure to update your notes on any appointment.

Entering a point of contact for a student

A point of contact is basically a way of entering session notes for a student when there was no scheduled appointment. Some examples of why you might do this are:

- A student sent you an email and you want to record the email in the student's file in ClockWork
- A student phoned you unexpectedly and you wish to record this in the student's file in ClockWork
- You ran into the student on campus and chatted with them and wish to record this in the student's file in ClockWork

The point of contact system in ClockWork was designed to be quick and easy to use in order to encourage staff to enter information that happens outside of the scope of scheduled appointments. This information provides additional insight when reviewing the student's file, and also indicates service delivery and can impact reporting as well.

To enter a new point of contact, press Alt + P. Alternately you can navigate to the toolbar on the main calendar and cursor right to the button named "New point of contact". The focus will be on a student drop list when the popup box opens. To select the student start typing the student's last name and press Enter when the correct name appears. Press Tab to enter the notes form and fill in the notes. You may wish to copy the contents of an email and paste them into the notes box in ClockWork, the standard Control + C for copy and Control + V for paste apply. Once you are finished press Alt + S to save the point of contact. Note that points of contact will appear in your appointments list for the day. If you wish to exclude points of contact from appearing with your appointments, navigate to the "Hide point of contacts" checkbox on the main calendar screen and check it using the spacebar.

Viewing a students intake information

Use the F11 key to search for a student. If you have pre-configured your ClockWork account so that the student information screen always appears automatically every time you search for a student with F11 the student information screen will automatically appear. If you wish to configure this setting please ask your administrator. If your administrator requires assistance they can submit a support ticket at <http://support.tpro.ca>.

If you have not configured the automatic student information setting on your account, press F2 to bring up the student information screen. Alternately you can press Alt to go the main menu, then press down twice on the Home menu category to find the "Student information" menu item, and press Enter to select it.

Once you are on the student information screen the summary tab will be the default focus and a

read-only summary of all of the student's information will appear. You are able to use the cursor keys to navigate the text area. Press Alt + C to close the student information screen.

To edit any of the information, press Shift + Tab while on the summary to go the tab control, then press the right cursor key to move to the first "Student info" tab. This tab contains the intake form and is editable using the standard Tab and Shift-Tab for navigation between the controls. Alt + S will save the changes.

[Viewing a students registered courses](#)

Bring up the student information screen using the steps outline in the previous section. Press Shift + Tab to move to the tab control, then use cursor right until you hit the Courses tab. Press Tab to enter the course listing for the student and use the cursor up and down keys to navigate the courses in the list. Note that courses come in automatically from the ClockWork data sync system and you should not have to edit this list. If you find that the information is incorrect please inform your administrator.

[Viewing / entering a students disability information](#)

Bring up the student information screen using the steps outlined in the previous section. Press Shift + Tab to move to the tab control, then use cursor right until you hit the Disability tab. Press Tab to enter the form and use Tab and Shift + Tab to navigate the various controls on the form. Note that each school is able to customize this form. It is very easy to re-organize the controls on the form or to provide custom keyboard shortcuts for specific fields. Please speak to your administrator if you have requests for modifications. Press Alt + S if you have made changes and wish to save.

[Viewing the history of student notes and points of contact](#)

Bring up the student information screen using the steps outlined in the previous section. Press Shift + Tab to move to the tab control, then use cursor right until you hit the Notes tab. Your notes tab may have a different name, such as History or Session Notes. Press Tab until you hit the Summary button. Alternately you can press Alt + A. A popup screen will appear with a list of all appointments and points of contact for this student. They are all pre-selected so you can just hit Enter to generate the summary. Use the cursor keys to navigate the read-only summary and press Alt + C to close the form when you are done. Note that Control + P will print the summary, and you are able to copy and paste the summary using Control + A to select all, then Control + C to copy, then Control + V to paste in another application such as Word.

Viewing / entering a students accommodation information

Use F11 to find a student. To call up the accommodation form you can press Control + A from the main calendar screen. Alternately you can press Alt to enter the main menu, then use cursor down on the Home menu item to find the Accommodations menu item.

Once the accommodations screen appears the default focus will be on the summary tab, which is similar to the one in the Student Information screen. The summary tab will show the student's approved accommodations if they have already been entered. If you just wish to view the accommodations you can use the cursor keys to navigate the read-only summary, and the press Alt + C to close the form when you are done.

If you wish to edit the accommodations or enter new ones, press Shift + Tab to enter the tab control. Then press cursor right to find the "Template" tab. Alternately you can press Alt + 2 to enter the Templates tab directly. Then press Tab to enter the first control on the accommodations form. It is very easy to re-organize the controls on the form or to provide custom keyboard shortcuts for specific fields. Please speak to your administrator if you have requests for modifications.

Anything entered on the Template tab form will be approved for the student for any course they are registered in. If you wish to enter course-specific accommodations you must navigate on the tab control to the tab with the name of the course you wish to modify accommodations for. You will find a copy of the accommodations form there, which is blank by default. If you leave it blank ClockWork will use whatever is filled in on the Template tab form for this course. If you start selecting accommodations ClockWork will use these accommodations instead of the ones entered on the Template tab form just for this course. To preview your changes before saving, navigate to the tab control and use cursor-left to switch back to the summary. The summary is automatically updated with the changes you have just made. Alternately you can press Alt + 1 to switch to the summary tab.

To save your changes press Alt + S. If you wish to generate letters you should use the "Generate letters and save" option instead (Alt + G). Please refer to the next section for more information.

Generating an accommodation letter

Use F11 to find a student. To call up the accommodation form you can press Control + A from the main calendar screen. Alternately you can press Alt to enter the main menu, then use cursor down on the Home menu item to find the Accommodations menu item.

Press Alt + G to choose the "Generate letters and save" option. Alternately you can use Tab to navigate to the toolbar, the first button is "Generate letters and save" – use the spacebar to select it.

A popup box will appear and the focused control will be a droplist containing the accommodation letter template you wish to use. This will be different for each school, and most schools only have one option in the list. If you are unsure which letter to select please ask your administrator. Once you select a template it will be automatically selected the next time you come to this popup box, even after closing and restarting your computer.

Press tab to navigate to the first option called "Send via email". If you are emailing your letters to the professor or student you should check this box. If you are going to be printing out the letters leave this box un-checked. Press tab to navigate to the next control. If you are emailing the letters, the "Send letter as attachment" should be checked if you wish to send the letter as a Pdf or Word attachment on the email. If your instructor will be viewing the accommodation letters online in the ClockWork web system this should be un-checked. If you are un-sure of what the settings should be please speak to your administrator. Whatever settings you choose will automatically be selected the next time you enter this area.

Press Alt + G to generate the letters. Alternately you can tab to the toolbar, where the first button is "Generate", and press the spacebar to select it.

If you chose to send your letters through email please refer to the next section for more information. Otherwise the letters will open in either a Word or Pdf file. There will be one page per course usually, so you will be able to navigate in Word or your Pdf reader software to review the letter before printing. Use the Word or Pdf reader functions to print the document for the student. Note that generating the letters will automatically close the accommodations form you had opened at the beginning of this process.

[Sending accommodation letters through email](#)

Follow the steps in the previous section to generate the letters. Once they are generated the accommodations form will close and a new form will open that contains previews of all emails. There will be one email per course that the student is currently registered in. Use the tab key to navigate to the pending emails list and the cursor keys to navigate the emails. Once you focus an email you will be able to tab to the email preview. You are able to manually modify any of the email fields before sending the email. For example, if the instructor email is missing you are able to add it in. Or you can add someone into the Cc or Bcc fields, or modify the body or subject line of the email. To preview the accommodation letter if you have chosen to attach it you can navigate to the attachments list and press Enter to view the letter in Word or a Pdf reader. To send the individual email navigate to the "Send this email" button. Once an email is sent it will be removed from the list of pending emails. To send all emails press Alt + A, or navigate to the "Send all emails" button. To cancel press Alt + C or navigate to the Cancel button.