ClockWork Training
Admin

Learning Objectives

Become familiar with the Admin interface
Create a new staff account
Reset a staff password
Create a group, assign group membership
Understand the difference between a setting and a permission
Assign permission and settings
Check & troubleshoot settings and permissions
Add appointment types, assign icon descriptions
Create a new ClockWork form
Become familiar with the forms editor
Discuss tips about designing forms to be more useable and better suited for reporting

users / resources

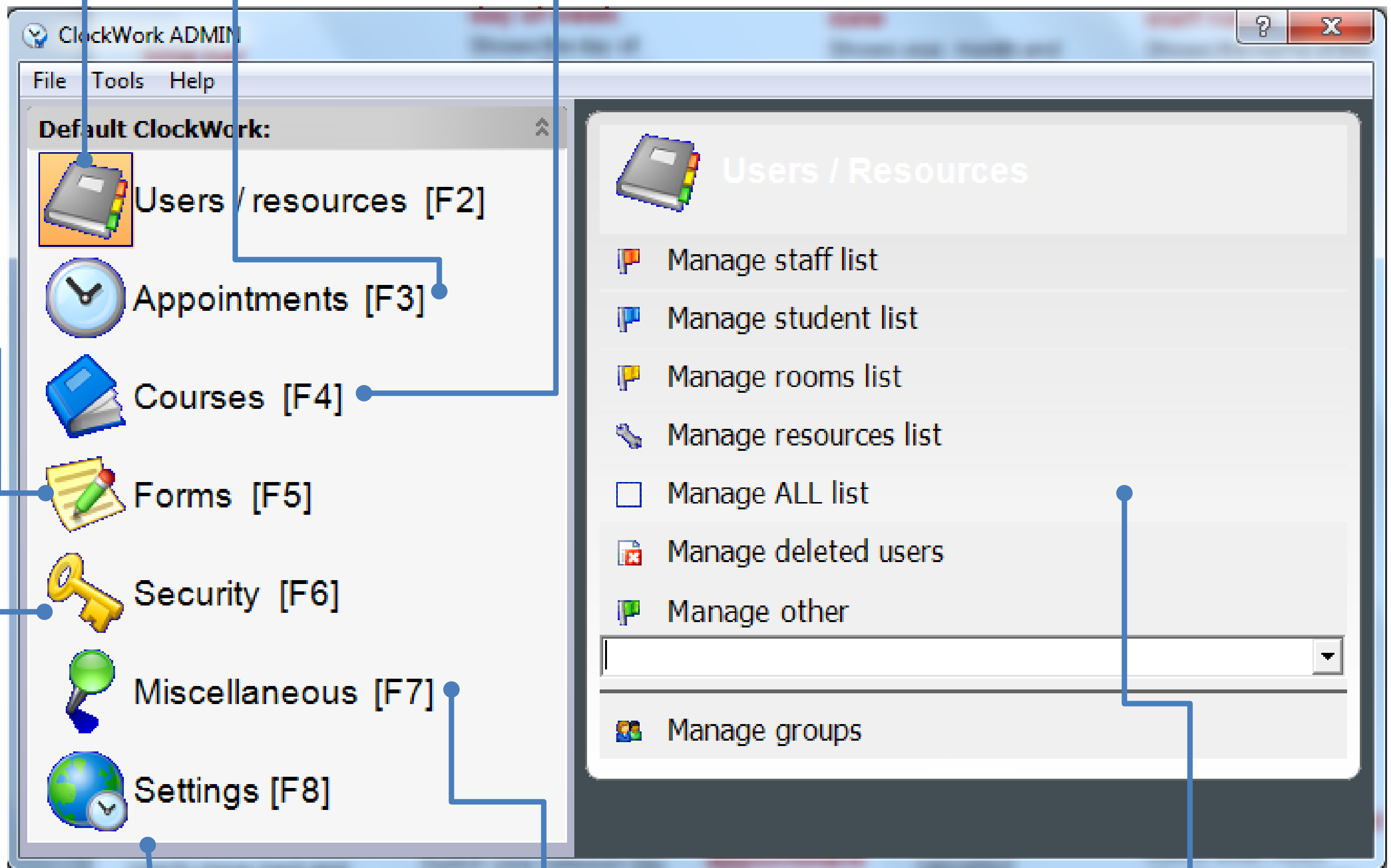
Manage accounts, group membership, and permissions & settings

appointments

Edit appointment types or appointment icon descriptions

courses

Edit lookup courses. Not normally required when data sync is enabled



forms

Edit and create ClockWork dynamic forms

security

How users will login to ClockWork

settings

Edit ClockWork settings for everyone, or ClockWork Web settings

miscellaneous

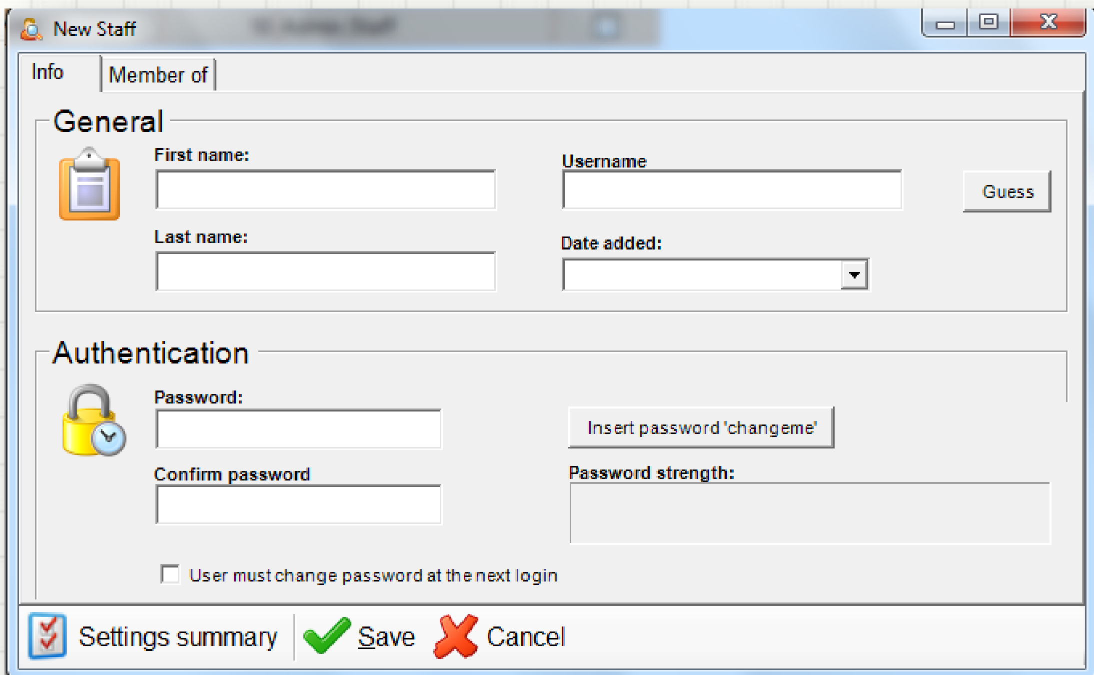
Setup the ClockWork daily job, check the logs, edit mail-merge templates

detail area

Changes as a new channel on the left is clicked

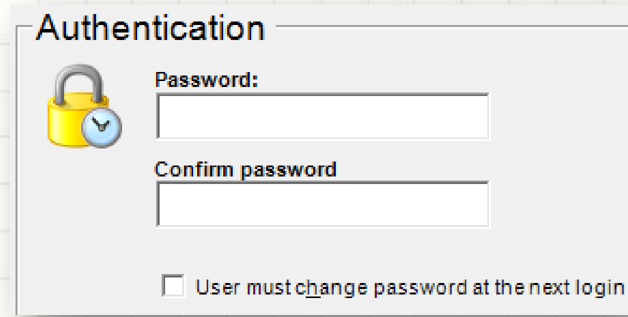
Create a staff account

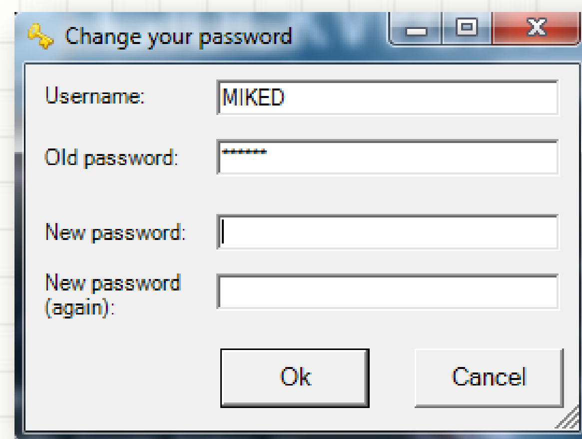
- Click on “Manage staff list”
- Click “Add new staff”
- Fill in the staff member’s name & username, and select a password for them
- Check “User must change password in the next login”
- (note that you are able to create an account without a password – no one will be able to login until you set a password)



Re-setting a staff password

- Click “Manage staff”
- Double-click on the staff name
- Type a new password in both password boxes
- Ensure that “User must change password at next login” is checked
- Click “Save”





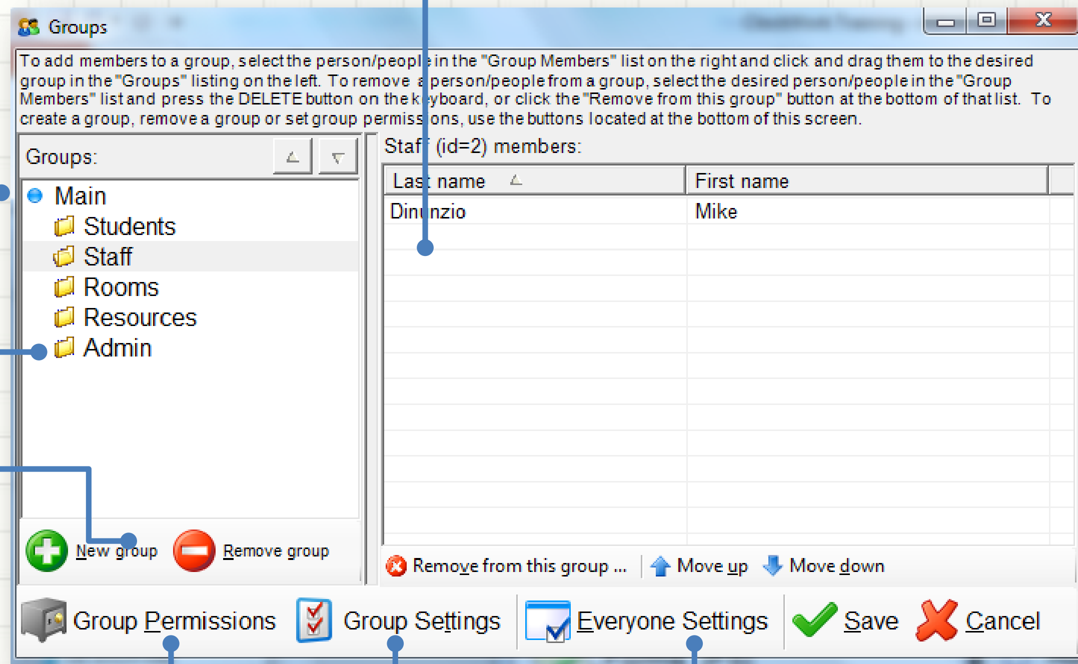
User account notes

- Staff, students, rooms and resources are all user objects in ClockWork
- Group membership decides what type of object each account is
- The built-in groups/roles are admin, staff, students, rooms, resources
- Groups can be used for organizational purposes, or to assign settings & permissions, or for both
- All deleted accounts in ClockWork can be restored using the admin interface

Manage groups

group members
The list of group members. The list changes as you click on a group in the left "groups" column

groupings
The items with the blue bullets are groups for organizing groups; they can only contain other groups and not users



groups
The list of groups

add/remove group
Allows you to create a new group and remove an existing group. Existing groups must be empty before they can be removed.

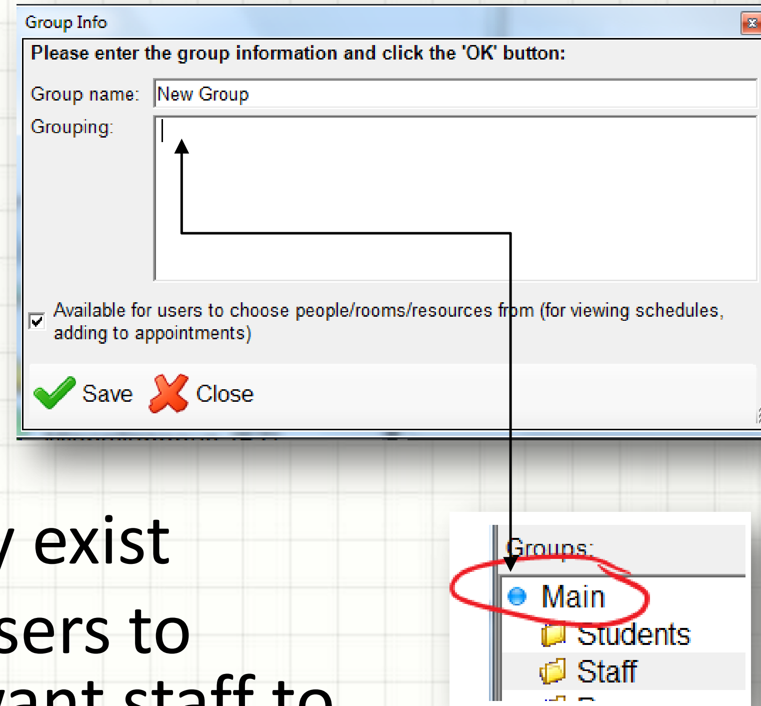
group permissions
First select a group from the "groups" list, then click "group permissions" to view and update the active permissions for that group.

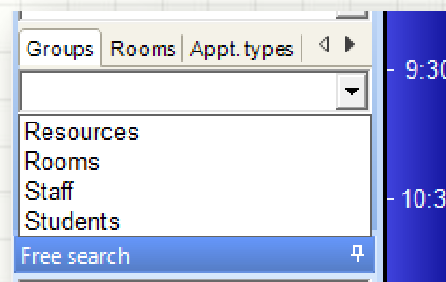
group settings
First select a group from the "groups" list, then click "group settings" to view and update the active settings for that group.

everyone settings
First select a group from the "groups" list, then click "everyone settings" to view and update the active settings for the "everyone" group.

Adding a group

- Click “New group”
- Enter a group name
- Optionally enter a “Grouping”. The grouping will become a new container for the group if it doesn’t already exist
- Un-check “available for users to choose…” if you do not want staff to see this in the groups list in ClockWork. You may not want it visible if this is strictly a group meant for permissions / settings.





Settings and Permissions

- Permissions are high-level, “broad-strokes”, yes or no options
- Settings are more detailed and may provide more detail than a simple yes or no. For example, a setting may indicate which reports a user is allowed to run, where a permission would indicate whether or not the user is allowed to run any reports.
- Settings and permissions can be set on groups or directly on users
- It’s a better long-term management strategy to set permissions and settings on groups rather than on users
- Setting and permission priority ordering is as follows (from highest to lowest): user, group, everyone, default.

Appointment types

today's highlights
Shows in the summary of daily "high profile" types of appointments (in the ClockWork main menu, Tools-Today's highlights)

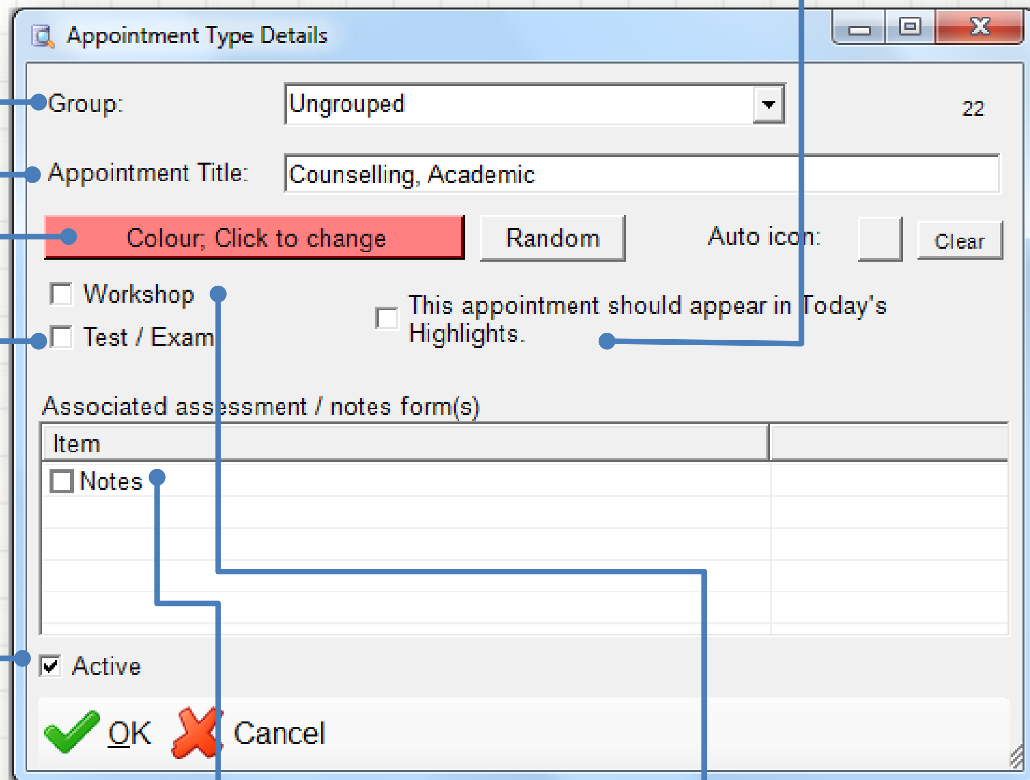
group
Assigns an organizational group. This parent group is only used in the admin for organization purposes.

appointment title
For display & reporting purposes

color
For display purposes only; this will appear on the staff calendars

test / exam
If this appointment type is a test or exam, check this box. Tests / exams have additional information like course, instructor, class time, etc., attached to them

workshop
If this appointment type is a workshop, check this box. Workshops have additional information like maximum attendee count, facilitator and fees.



notes forms
These are forms; checking off a form will mean it will be available as a tab inside the appointment for the staff to enter notes in.

workshop
If this appointment type is a workshop, check this box. Workshops have additional information like maximum attendee count, facilitator and fees.

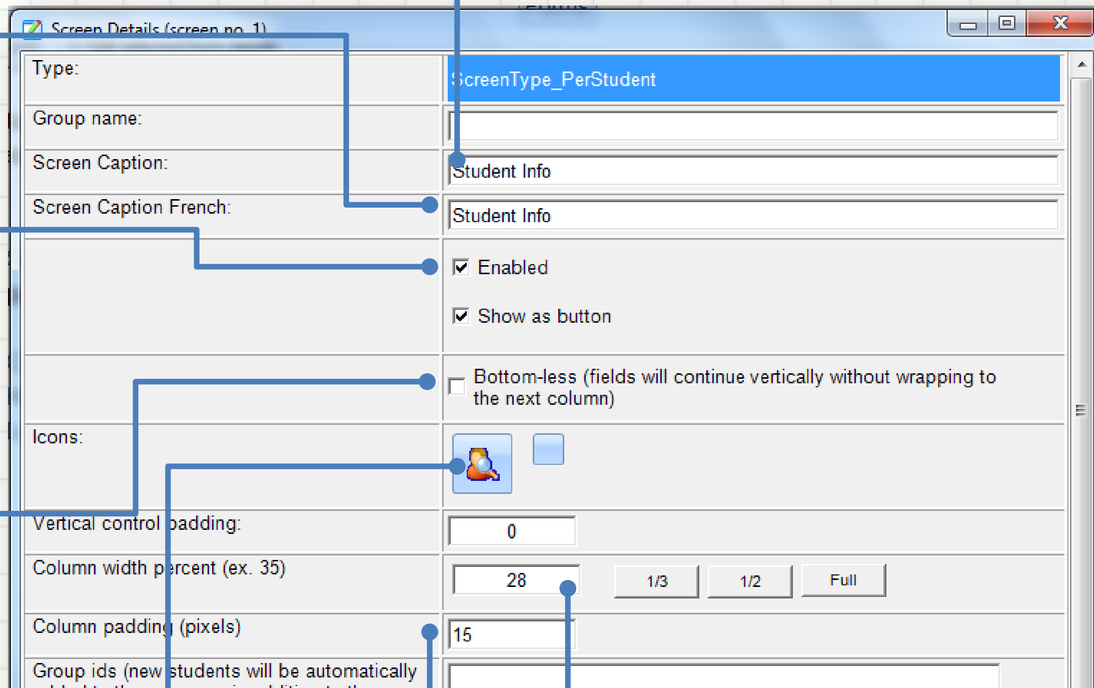
Creating a new form

- Click Forms, then Manage forms
- Click "Add new form" at the bottom left
- Select the type of form you would like to create:
  - Per student: each student gets one form. Useful for the intake / registration form, and most common type of form
  - Per appointment: each student gets a new form for each appointment
  - Per date: you can add a new blank form for the student any time you like; the forms are date stamped. Useful for bursary applications, requests for referrals.
  - Anonymous: data is not attached to the student. Highly confidential data can be stored and reported on, without any risk associated
  - Survey / evaluation: you can send a link out through batch email to students. Students can follow the link and fill out the form. You can report on the data through ClockWork reports.
  - Staff per date: Each staff gets a single screen with fields of data for each date
  - Instructor per date: used for the test booking form the instructor fills in with information about an upcoming test or exam

Form details

caption
The name of the form. This will appear on the button in the staff interface

caption
Make this field the same as the one above it



enabled / show as button
If either checkbox is un-checked, the button for this form will not appear on the staff ClockWork interface. Un-check the "enabled" field if you are no longer using this form.

bottom-less
ClockWork will normally wrap flow up to the next column when it reaches the bottom of the screen. If you check this box, it will not do this and a vertical scroll-bar will appear to access controls below the bottom of the screen.

icons
The large icon shows on the button in the ClockWork interface. The small icon is only for per-appointment forms, and will appear on the appointment once notes have been entered.

column padding
The number of pixels between columns

column width
The percentage width of each column on the screen. Setting 33% will mean that there will be 3 columns. Usually you would use 1/3 or ½ or Full.

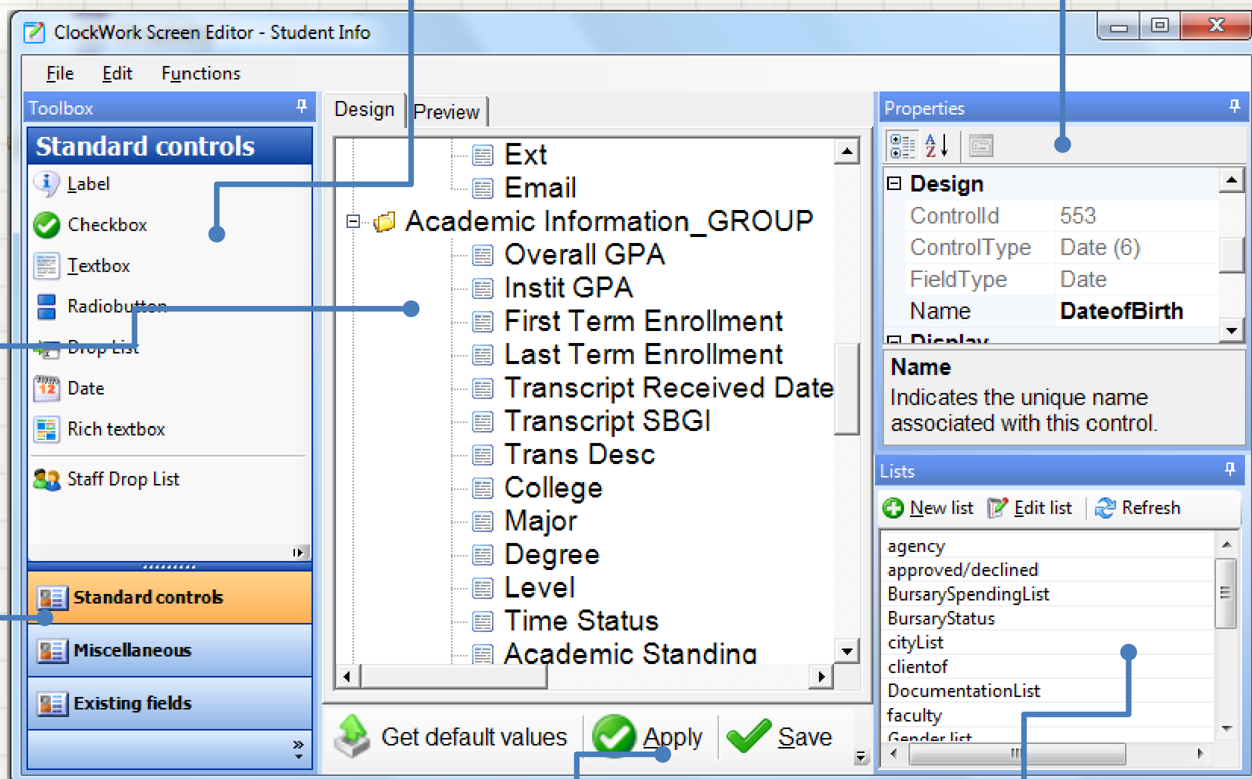
Form Editor

toolbox
Types of fields you are able to drag onto your form.

property box
Clicking once on a field in the design view will show the properties for that field in this area. Click on a field to modify the value. Different types of controls have different properties.

design view
All fields on the form are show in a list view for easy manipulation. You can click more than one field by holding <shift> or <ctrl>, you can delete by hitting the <delete> key after selecting one or more fields, you can drag field(s) around with your mouse.

extended options
Provides access to advanced types of controls, and “Existing fields” for accessing fields on other forms.



apply
Saves the form, but doesn’t close it like the “Save” button does.

lists
This is the list of lists. You can double-click to edit a list, or click “New list” to add a new one. Lists are used for drop-lists, tables, and radio buttons controls.

Common fields