

# DISABILITY SERVICES

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## ClockWork Training Manual (Reports)



# **CLOCKWORK TRAINING**

## **RUNNING REPORTS**

### **LEARNING OBJECTIVES**

Become familiar with the Reports Software

Run a report

Search for a report

Use sorting, filtering and grouping

Export report results to Excel

Send batch emails

Authorizing staff to run reports

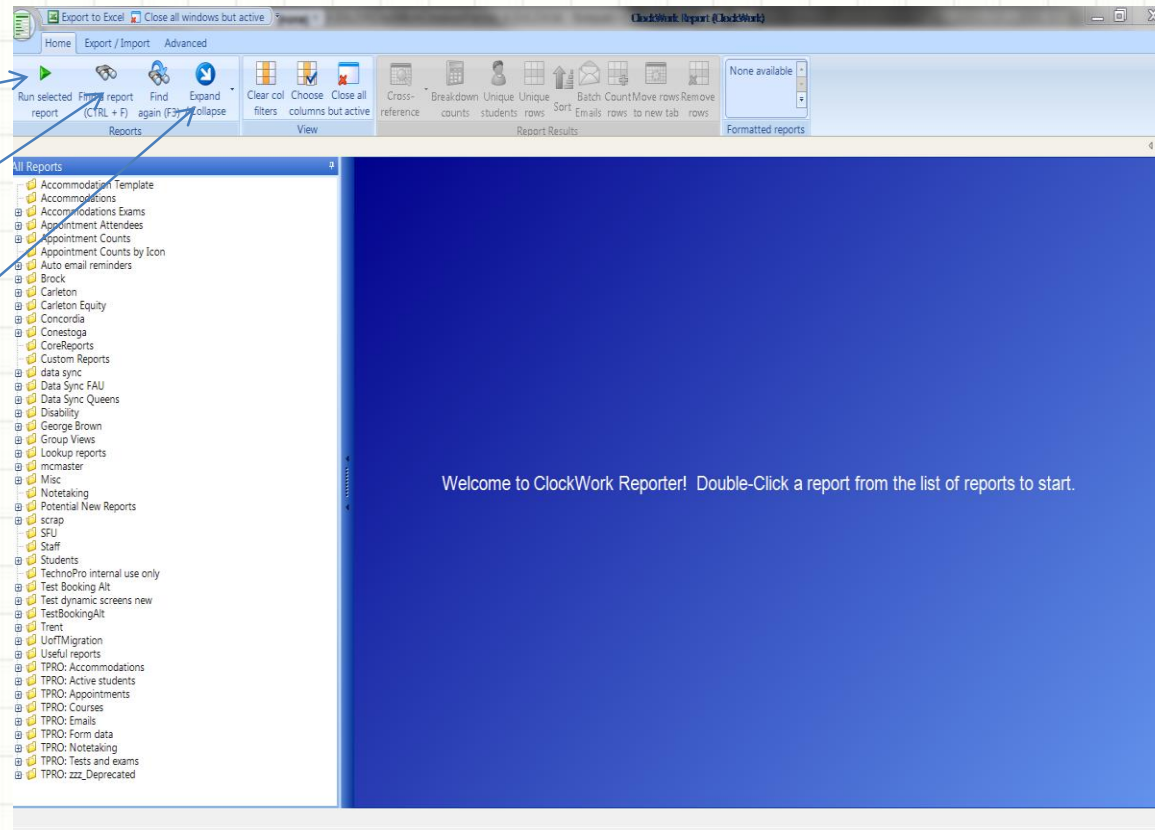
Import a report

# General View of Reports

To run a report, Select the report from the menu of the left and click on the Green "Play" button or double click on the report

Search for a report using a keyword

Use the Expand/Collapse to view all the reports within the folders



# Finding a report

- The simplest way to locate a report is to browse through the report folders. Click on the plus sign to open the folder and view the contents. Folders may be nested in other folders. Reports are organized by functionality.
- To search for a report using a keyword, click the “Find report” button in the main ribbon bar at the top, or hold the <CTRL> key on your keyboard while pressing the letter F. Enter a search string. To search for the next occurrence hit F3 on your keyboard.

# Running a report

- To run a report simply double-click on. You will be prompted with a parameters popup box. This will be different for most reports and will contain information relevant to the report you are running.
- Your parameters will be automatically saved on your computer for the next time you run a report, so that you can see the values used in the last execution of the report.
- Your name and the date and time will be marked as the last usage of the report.

# Filtering, sorting and grouping

- You can manipulate data in a report result set by using filtering, sorting and grouping functionality.
- Filtering allows you to quickly find matching rows in a table based on a search string or simple rule. The filtering row is the first row directly beneath the column headers. Simply type in a search string to filter by that row.
- Sorting can be accomplished by simply clicking once on the column header you would like to sort by. Clicking a second time will perform a reverse sort. If you wish to perform a more complicated sort (for example, first sort by last name and then by first name), you can use the “Sort” button located in the main ribbon bar at the top.
- Grouping allows you to organize the report results table into a series of sections based on unique values. For example, if you grouped a list of students with faculty by faculty, you would get a unique list of faculties, each one with a list of students belonging to that faculty. Simply drag the column header you would like to group by to the top row that says “Drag a column here to group by this column”.

Results Breakdown

field	fieldvalue	student_no_count	student_no_%_of_total	allb
Contains: ▼	C science ▼	Equal: ▼	Equal: ▼	Equal: ▼
Faculty	Arts & Science	12	1.21	
	Health Science	89	8.99	
	Science	153	15.45	
	Social Scienc...	207	20.91	

Group by: Faculty

	firstname	lastname	student_no	Date_of_birth	Data
Contains: ▼	Contains: ▼	Contains: ▼	Contains: ▼	Contains: ▼	Conta
▼ Faculty:					
▲ Faculty: Arts & Science					
	Harry	Allen	3548500	Sep 24 1982 6:31PM	
	Julius	Evans	2620247	Mar 14 1986 5:12PM	
	Don	Garcia	7178803	May 18 2006 7:06PM	
	Dorsey	Martin	4663215	May 5 1983 6:36PM	
	Sonny	Martinez	7447551	Jan 25 1983 7:31PM	
	Gayle	Ramirez	2338037	May 11 1986 6:19PM	
	Jacques	Richardson	8818641	Mar 6 1986 6:10PM	
	Rogelio	Richardson	4421646	Aug 12 1986 5:17PM	
	Del	Ross	6611011	Feb 20 1986 5:32PM	
	Ward	Torres	4321165	Jun 14 1986 1:08PM	
	Jc	White	1406416	Apr 19 1988 3:39PM	
	Yong	Wilson	7667836	Oct 13 1984 11:45AM	
▲ Faculty: Business					
	Bradley	Bailey	0153248	Sep 5 1982 12:00AM	
	Andrew	Baker	7004608	May 10 1984 7:07PM	
	Mack	Bell	5035221	Feb 12 1986 3:40PM	

# Authorizing staff to run reports

- Only administrators in ClockWork have permissions to use the ClockWork reports software by default. You can grant permissions for non-administrator users to access the ClockWork reports through the ClockWork permissions system. However, non-administrator users can run reports from within ClockWork without the need for accessing the ClockWork reports software. This provides them with execute-only access to reports and is the recommended method.
- Call up the user or group in ClockWork admin that you would like to assign permissions to run reports to. Click on the “Settings” button at the bottom.
- Double-click the item that says “Reports the user can run through the main ClockWork software”, and check off the reports you would like to grant access to.
- When the user logs into ClockWork they will see a new menu option called “Reports” at the top. They will be able to run authorized reports from the list.

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# CLOCKWORK TRAINING REPORT FUNCTIONALITY

## LEARNING OBJECTIVES

Clone a report

Create a group

Move a report to another group

Cross-reference

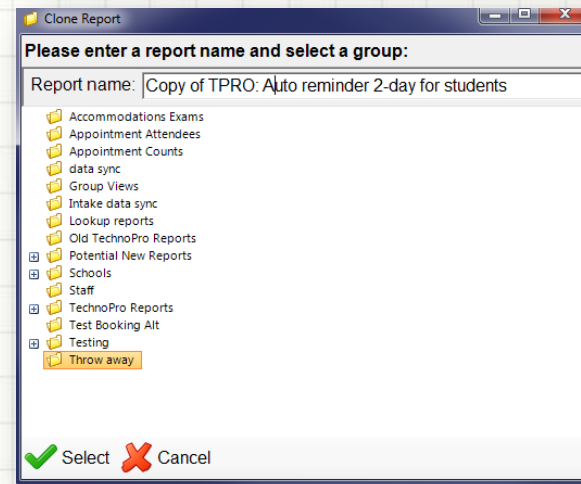
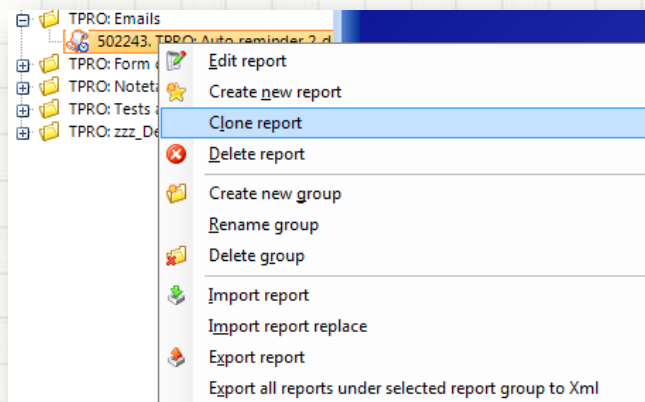
Breakdown counts

Edit a report

Modify a report

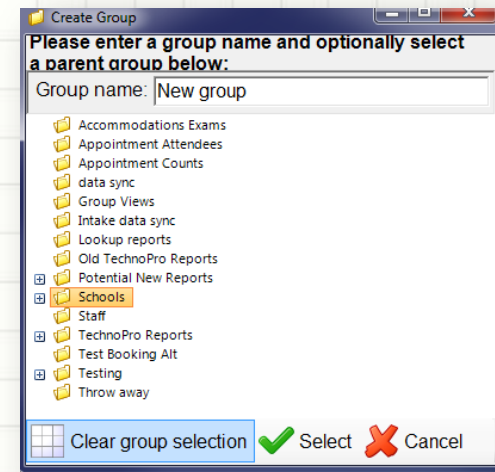
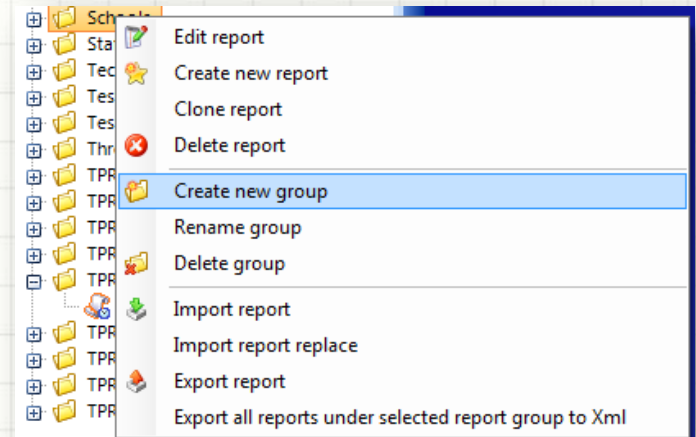
# Clone a Report

- Cloning a report makes a complete copy of a report. You may want to do this for several reasons:
  - You want to modify a TechnoPro report that is un-editable to you as a starting point for a new report;
  - You want to take an existing report and add some additional functionality to create a new report, while keeping the old report intact;
  - You want to make some changes to an offline copy of a report, you can edit the clone until your changes are complete;
  - You want to view a TechnoPro report for learning purposes.
- Right-click on the report you would like to clone and choose “Clone report”
- Choose the name and where to save the report
- Navigate to the folder you saved the cloned report to in order to find your new report



# Managing report groups

- To create a new group, right-click on an existing group or the blank space beneath the groups, and choose “Create new group”. NOTE: All group names must be unique.
- To rename a group, right-click on it and choose “Rename group”.
- To move a group to another group, hold the <SHIFT> key on your keyboard while dragging the group to the desired spot.
- To remove a group from the system it must be empty: right-click on the group and choose “Delete group”

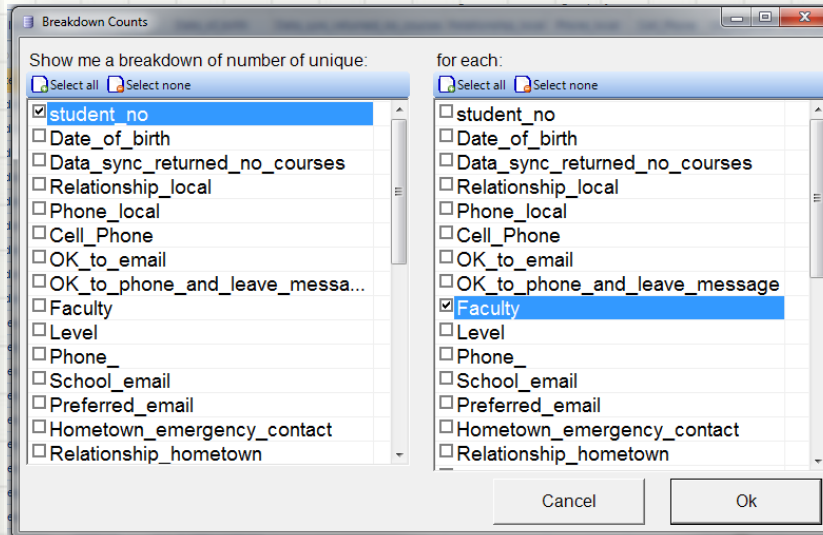


# Cross-referencing information

- Cross-referencing is a function that allows you to “pull in” data to a report results set from other places in ClockWork. You are able to cross-reference data from any per student form, such as the intake form and disability form, and from the accommodations form.
- First, run a report that has students in the results set. Then click “Cross-reference” in the ribbon bar at the top.
- Select the appropriate option and check off all fields you would like to pull in. ClockWork will lookup data for each student and add columns to the current result set with the lookup information you check off.

# Finding counts (Breakdown counts)

- Breaking down counts allows you to receive a breakdown of numbers from an existing report set. For example, if you have a result set that lists students with appointments they've had you can get a number of students per unique appointment type list using this function.
- First, run the report you would like to breakdown numbers for. Then choose "Breakdown counts" from the menu at the top.
- There should only be one item selected in the left column and one item selected in the right column. To choose number of students by appointment type, you should check off student\_no in the left column and appointmenttitle in the right column.



field	fieldvalue	student_no_count	student_no_%_of_total	allblanks_count	multiple_count	total_count
Contains: ▾	Contains: ▾	Equal: ▾	Equal: ▾	Equal: ▾	Equal: ▾	Equal: ▾
Faculty	Arts & Science	12	1.21			
	Business	39	3.94			
	Continuing E...	1	0.1			
	Divinity	1	0.1			
	Engineering	71	7.17			
	Health Science	89	8.99			
	Humanities	134	13.54			
	Science	153	15.45			
	Social Scienc...	207	20.91			
Total				283	0	990

# Editing reports

- To edit a report, right-click on it and choose “Edit report”. Tip: Clone a report before editing it so that you have a backup of the report.
- A report is made up of a series of steps. The steps will be listed in the main table and can be re-ordered if necessary using the arrow buttons at the top. Double-click on a report step to edit the step.
- You can cancel your changes by clicking the “Cancel” button and answering “No” when prompted to save.

Function Type	Function Type Description
Batch Email with Mail Merge	The text from the TPemailer template. The codes will be the column names of the cu