

# CLOCKWORK

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## Training Manual and Reference: Inventory

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# CLOCKWORK TRAINING INVENTORY

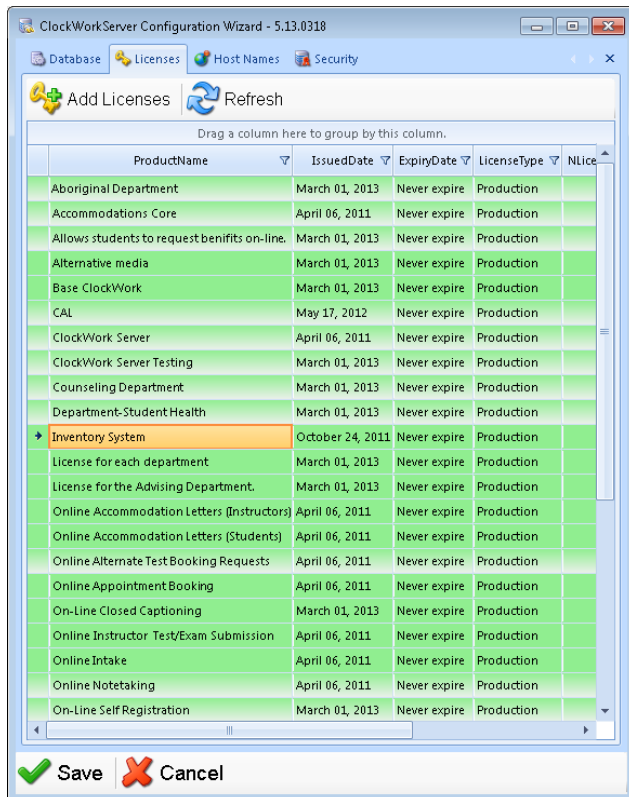
## LEARNING OBJECTIVES

- Become familiar with the Inventory interface
- Create a new catalog
- Create a category and a sub-category
- Add a product in the Product List
- Become familiar with Movement History
- Understand the difference between loans and reservations
- Make loans
- Make reservations
- Show Product Report
- Become familiar with the graphical calendar

# License Key

- The inventory 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

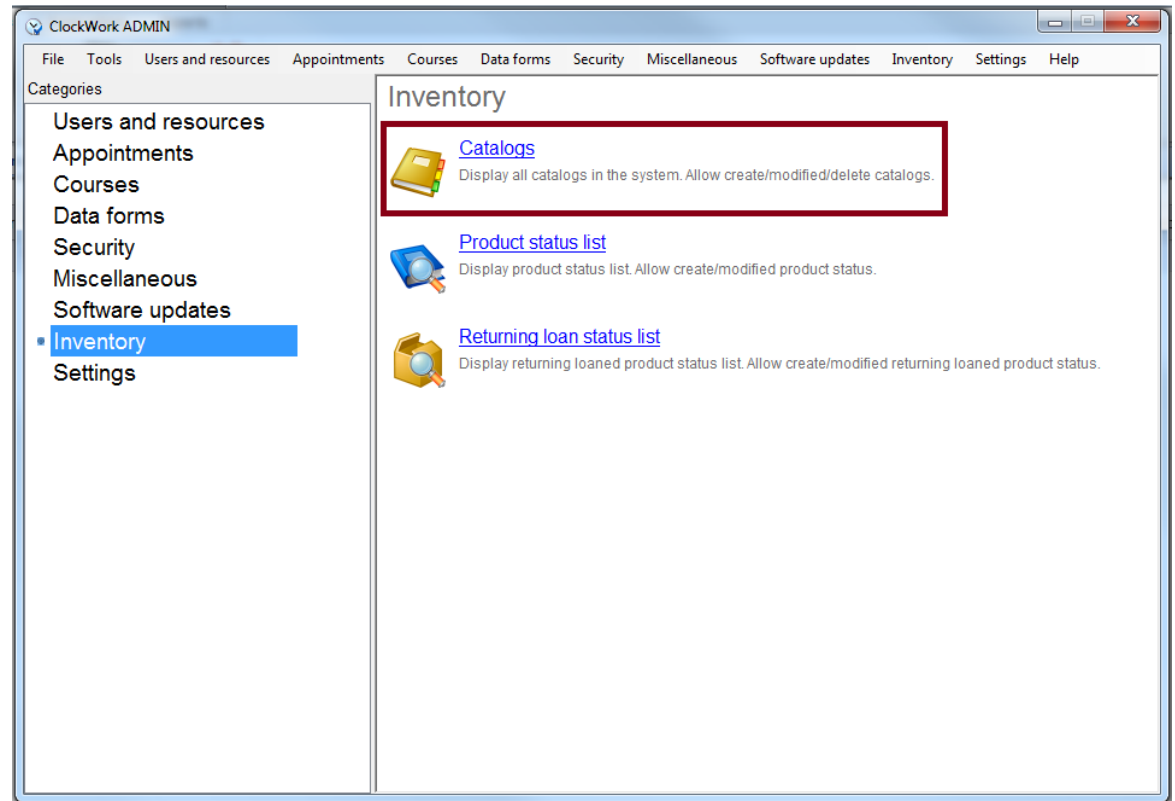
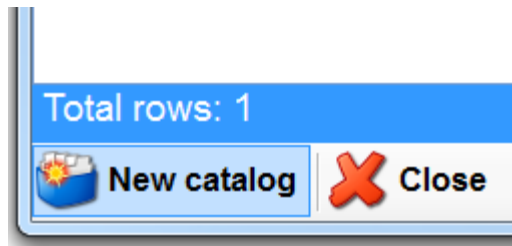
## How do you know if the license key is not imported?

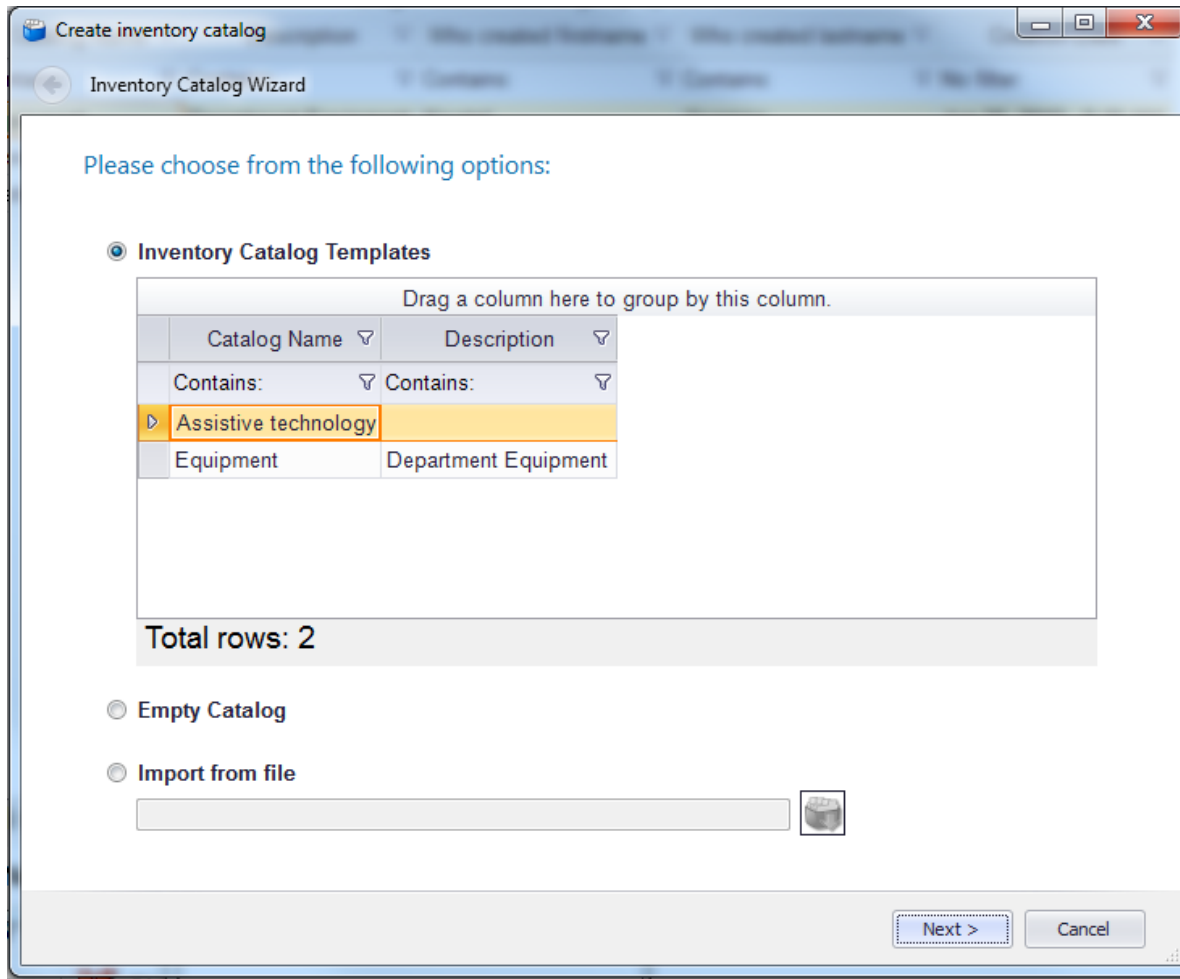


- In the server, go to Start > All Programs > TechnoPro > ClockWork 5 Server > Clockwork Server Initialization Wizard
- It should have 'Inventory System' in the Licenses tab

# Create a catalog

- Add a catalog by going to ClockWork Admin > Inventory > Catalogs > New Catalog
- Select the New Catalog button





You will then choose from the wizard:

- 1) To select an already built-in Template
- 2) To create an empty catalog
- 3) To import an existing template (See page 66 for details)

Inventory catalog list

Drag a column here to group by this column.

Catalog Name ▼	Description ▼	Who created firstname ▼	Who created lastname ▼	Creation Date ▼
Contains: ▼	Contains: ▼	Contains: ▼	Contains: ▼	No filter: ▼
▶ Equipment	Department Equipment	Krystal	Ocampo	Jun 25, 2013 . 9:19 AM
Assistive technology		Krystal	Ocampo	Aug 2, 2013 . 4:50 PM

- Catalog Name, Catalog ID, Who created, and the Creation Date cannot be edited.
- To edit the catalog's description, double click on the selected catalog or right-click and select Edit Catalog.
- A catalog can only be deleted if it's empty; you must first delete all the categories and products in the catalog.
- Right-click and select Delete Catalog



# Assign permissions

Settings for everyone

Everyone settings

Miscellaneous

Forms

Buttons

Appointments

Users

Students

Accommodations

Exams

Courses

Alternative Format

Inventory

System

Drag a column here to group by this column.

Group	Title	Is d...	Value
Contains.	Contains.	Contains.	
Inventory	Allowed inventory catalogs	<input type="checkbox"/>	40
Inventory	Is an inventory Admin User?	<input type="checkbox"/>	
Inventory	Comma separated list of report ids for inventory system	<input type="checkbox"/>	502490,502492,502493,502494,502495,502...

- After adding the Catalog, by default, users are not going to be able to see it right away. First, add a permission to allow users to see the Catalog.
- By going to ClockWork Main Settings > Inventory > Allow catalog Ids.
- Select the appropriate catalog
- Click Save

# Categories and Sub-categories

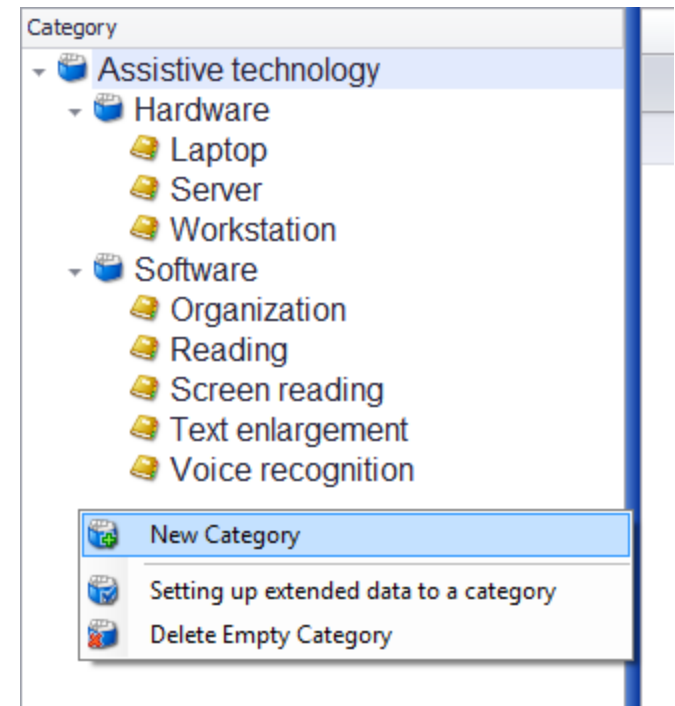
When you open the catalog, on the side you will see a Category section...

- Right-click and select New Category.

**Example:** Hardware, Software

- The same for when you're creating a sub-category.

**Example:** Laptop, Server, Workstation



- To delete a category or sub-category, they should not contain any product. You can only delete a category if it's empty.
- Right-click and select Delete Empty Category

# Assign a Dynamic Form

- Step 1: Build the form using “Per Inventory” in ClockWork Admin’s Data Forms.
- Go to ClockWork Admin > Data Forms > Manage Data Forms > Create new form > Inventory product

The image shows two screenshots from the ClockWork Admin interface. The top screenshot is the 'Dynamic Forms List' window, which displays a tree view of form categories and their associated forms. The 'Create new form' button in the top toolbar is highlighted with a red box. The bottom screenshot is the 'Form Type Chooser' dialog box, which prompts the user to select a form type. The 'Inventory product' option is highlighted with a red box.

Dynamic Forms	Id	Active
Disability forms		
PerStudent		
Student Info Disability	1	
Accommodations Template	4	
Disability	8	
Accommodation Letters	17	
PerAppointment		
History (Disability)	10	
Additional test info form	15	
PerInstructor		
Instructor test info	16	
PerDate		
BSWD	25	
Un-grouped forms		
PerStudent		
Staff Info	7	
Counselling forms		
PerAppointment		
History (Counselling)	9	
PerStudent		
Student Info Counselling	14	
PerDate		
Referral	24	
Inventory forms		
PerInventory		
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**Form Type Chooser**

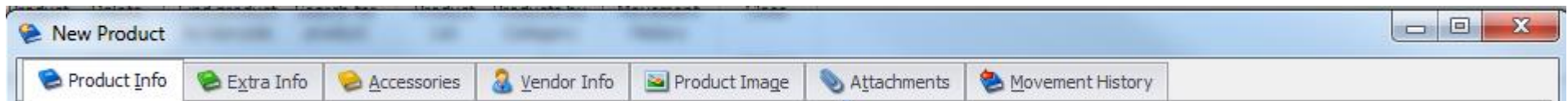
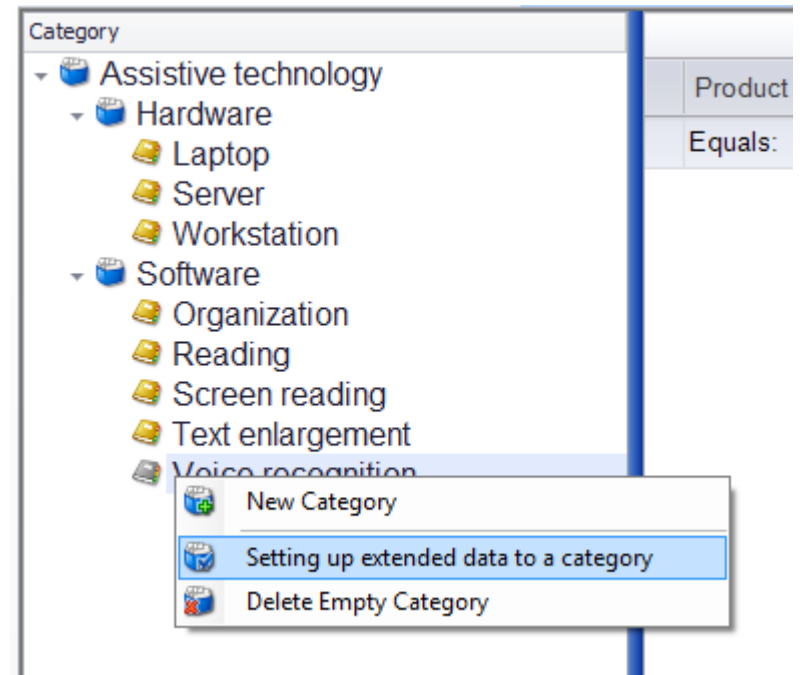
Please select the type of form (screen):

- Student  
Each student gets a single screen with fields of data - you can update the fields at any time.
- Date  
You can create any number of instances of a form for each student. Form entries are dated.
- Appointment  
Each student gets a single screen with fields of data - you can update the fields at any time.
- Anonymous  
Each student gets a single screen with fields of data - you can update the fields at any time.
- Survey / evaluation  
Each student gets a single screen with fields of data - you can update the fields at any time.
- Staff per date  
Each staff gets a single screen with fields of data for each date.
- Instructor per date  
Use for instructor test info (by date) for online test confirmation
- Inventory product  
Each inventory product gets a single screen with fields of data; you can update the fields at any time.
- Alt format content  
Each Alternative Format media content gets a single screen with fields of data; you can update the fields at any time.

✓ Select ✗ Cancel

- ]
- Step 2: Select a category or a sub-category
  - Step 3: Right-click on the category or sub-category, and select “Setting up extended data to a category”

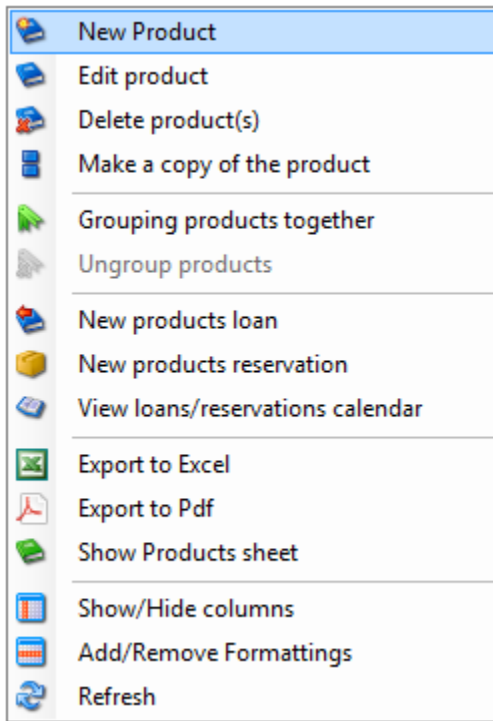
This will show as an Extra Info tab between the Product Info and Accessories.



# PRODUCTS

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# New Product



There are two ways to add a new product.

- You can use the button on top of the screen
- Or you can right-click on the Product List screen.
  - Select New Product

- A screen will appear with tabs of Product Info, Extra Info, Accessories, Vendor Info, Product Image, Attachments, and Movement History

**New Product**

Product Info | Extra Info | Accessories | Vendor Info | Product Image | Attachments | Movement History

**General**

Product Unique ID: 00000000-0000-0000-0000-000000000000

Product Name:

Category:

Serial Number:

Status:

Product owner:

Description:

Notes:

Group:

Is Loaned?

**Location**

Location:

No location

**Bar Code**

Type or use a barcode scanner

[Barcode will be assigned automatically]

Save + Clone Product | Save | Cancel

# Product Info

**Category:** The path of the product.

**Status:** Choose the appropriate item from the product-status drop down list.

**Is Loaned?** If its loaned to a student, the box will have a check mark in it.

**Save:** Click the 'Save' button at the bottom to create the product

**Location:** In case, you're missing a product, you'll know where to look for it.

**Bar Code:** When you're adding a product, a barcode is mandatory. You can scan it, or assign a barcode by clicking the button in the middle. The barcode will be the Catalog's first 3 letters and the Product ID.

The system will automatically assign it for you.

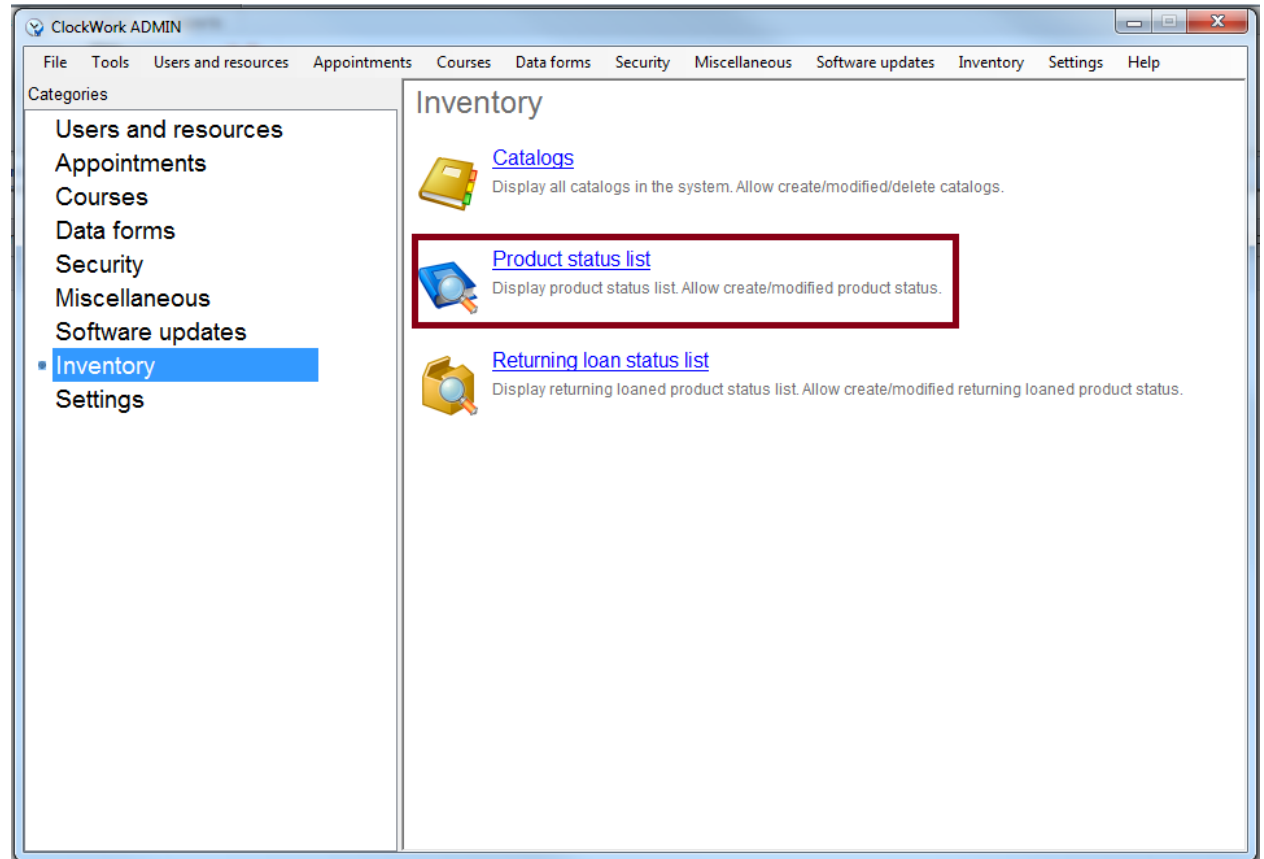
**Print:** You can also print this barcode to put on your equipment by selecting the button on the right.

The screenshot shows a 'New Product' window with tabs for Product Info, Extra Info, Accessories, Vendor Info, Product Image, Attachments, and Movement History. The 'General' tab is active, showing fields for Product Unique ID, Product Name, Category (set to 'Equipment'), Serial Number, Status (set to 'Normal'), Product owner (Ocampo, Krystal . KOCAMPO), Description, Notes, and Group. A 'Location' field is empty with the text 'No location'. A 'Bar Code' section contains a blue button that says 'Type or use a barcode scanner' and a text field with the placeholder '[Barcode will be assigned automatically]'. At the bottom, there are buttons for 'Save + Clone Product', 'Save', and 'Cancel'.

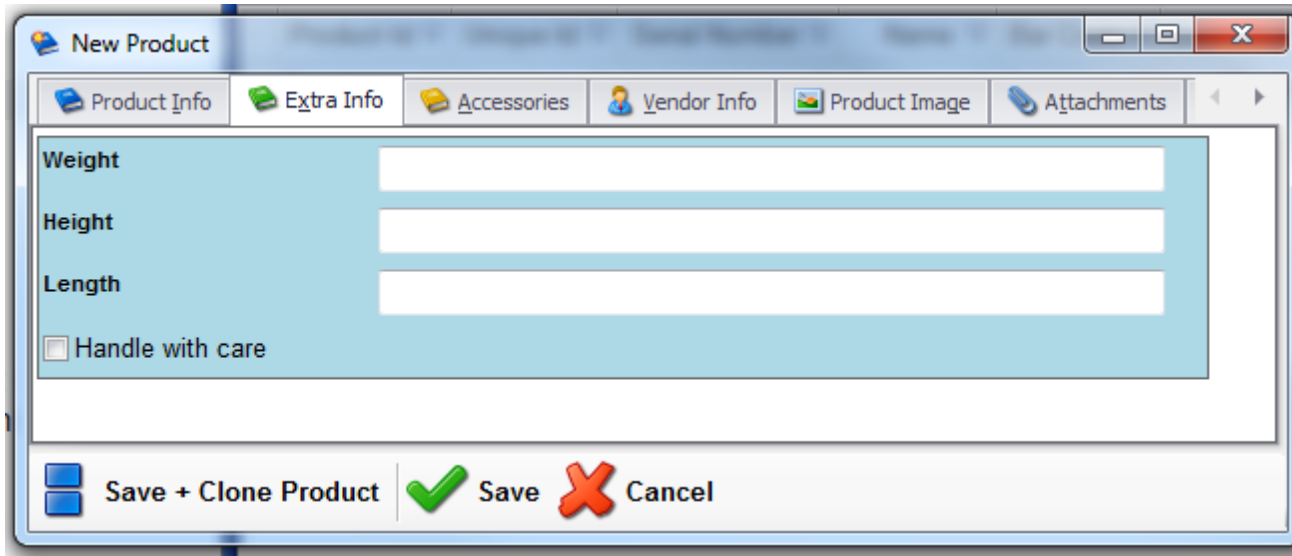


## Product Status

- From the Product Info in the New Product screen, there's a Status drop down menu.
- This menu can be change by going ClockWork Admin > Inventory > Product Status List



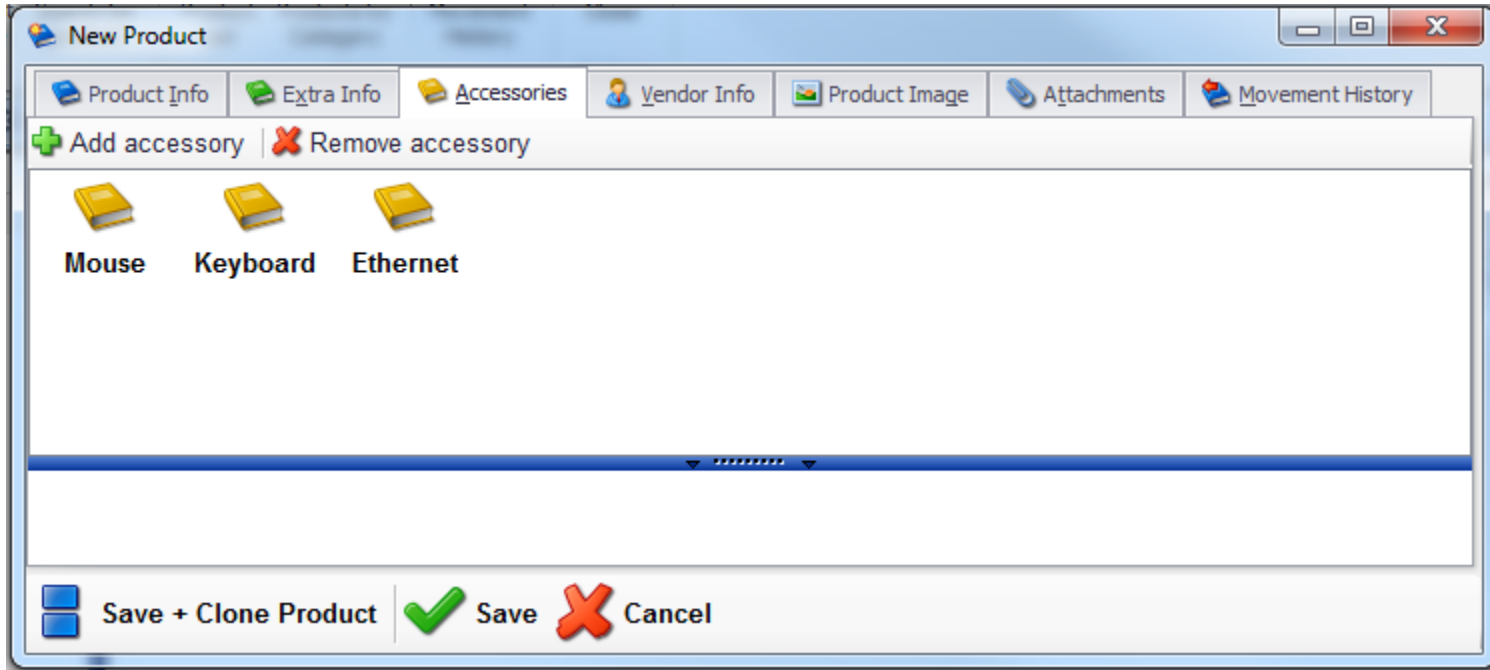
## Extra Info



The screenshot shows a web application window titled "New Product". The window has a tabbed interface with the following tabs: "Product Info", "Extra Info", "Accessories", "Vendor Info", "Product Image", and "Attachments". The "Extra Info" tab is currently selected and active. It contains three text input fields labeled "Weight", "Height", and "Length". Below these fields is a checkbox labeled "Handle with care". At the bottom of the form, there are three buttons: "Save + Clone Product" (with a blue folder icon), "Save" (with a green checkmark icon), and "Cancel" (with a red X icon).

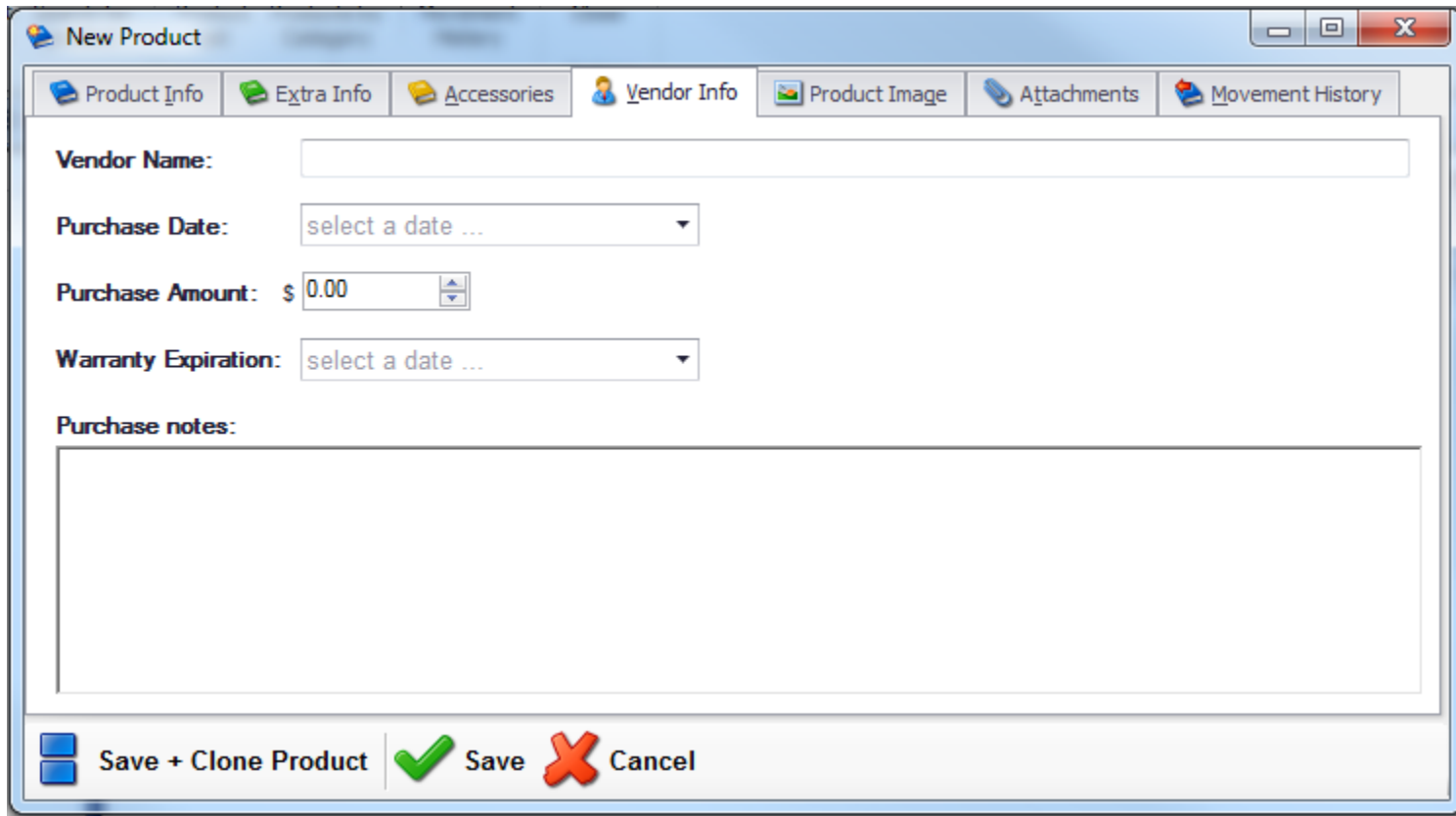
- When you assign a form to a category, an Extra Info tab will appear between the Product Info and Accessories
- To assign a form, refer back to page 11

## Accessories



- A product may have accessories that you want to keep track of.
- For instance, a computer has a keyboard and a mouse. Instead of adding a new product for the keyboard and the mouse, you can add them as an accessories to a product.

## Vendor Info



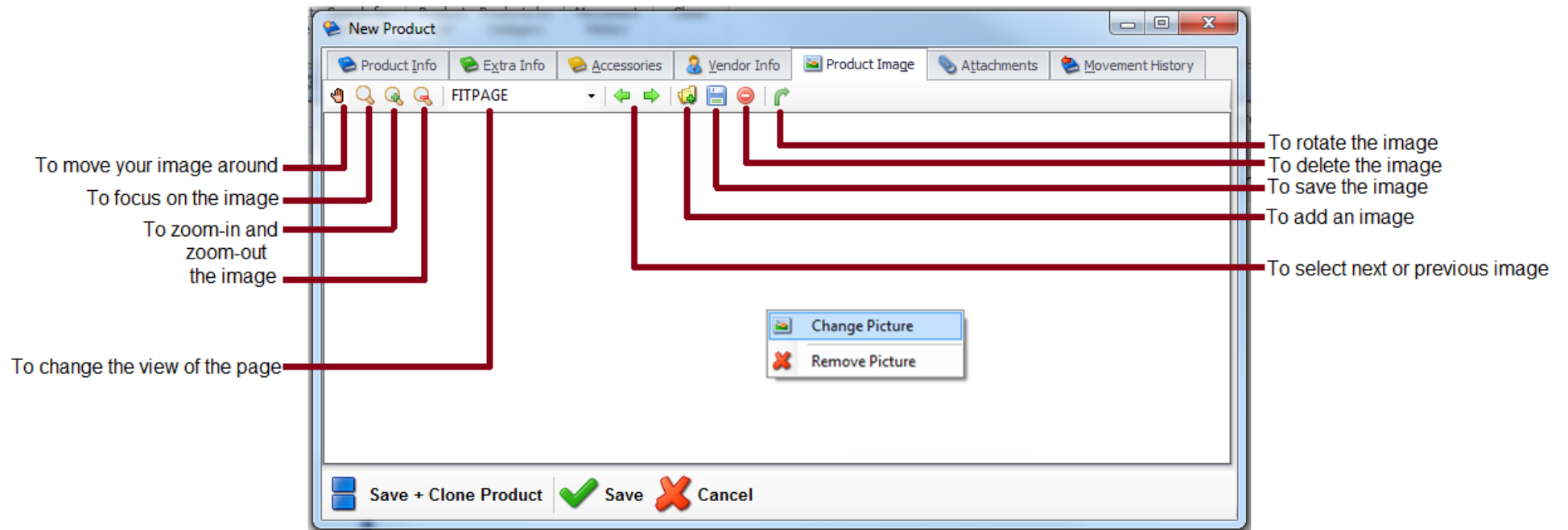
The screenshot shows a software window titled "New Product" with a tabbed interface. The "Vendor Info" tab is selected. The form contains the following fields:

- Vendor Name:** A text input field.
- Purchase Date:** A date selection dropdown menu showing "select a date ...".
- Purchase Amount:** A numeric input field with a dollar sign prefix, currently showing "0.00".
- Warranty Expiration:** A date selection dropdown menu showing "select a date ...".
- Purchase notes:** A large, empty text area for entering notes.

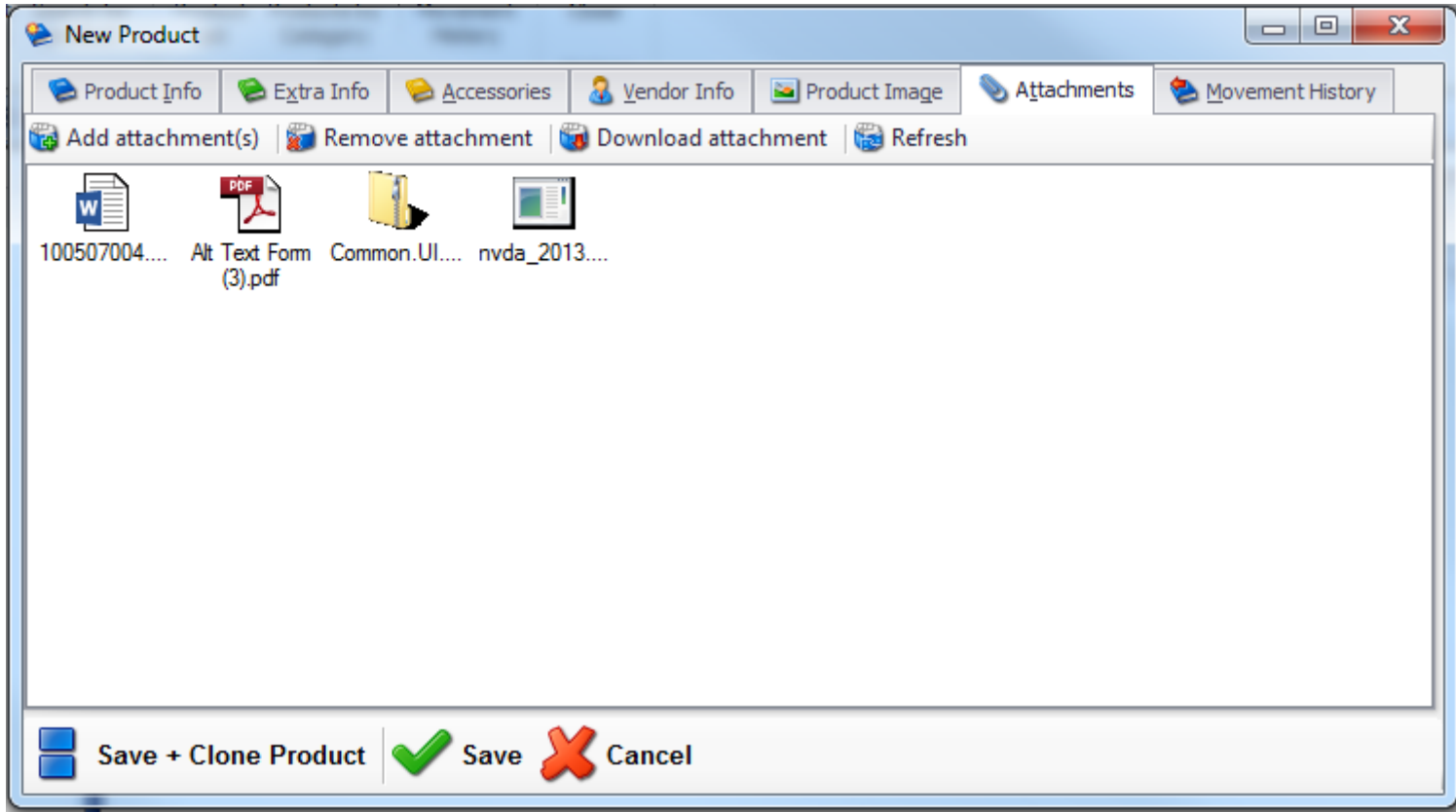
At the bottom of the window, there are three buttons: "Save + Clone Product" (with a blue square icon), "Save" (with a green checkmark icon), and "Cancel" (with a red X icon).

- This section is for the product's price, warranty expiration date, and where and when it was bought.
- Anything related to the vendor

# Product Image

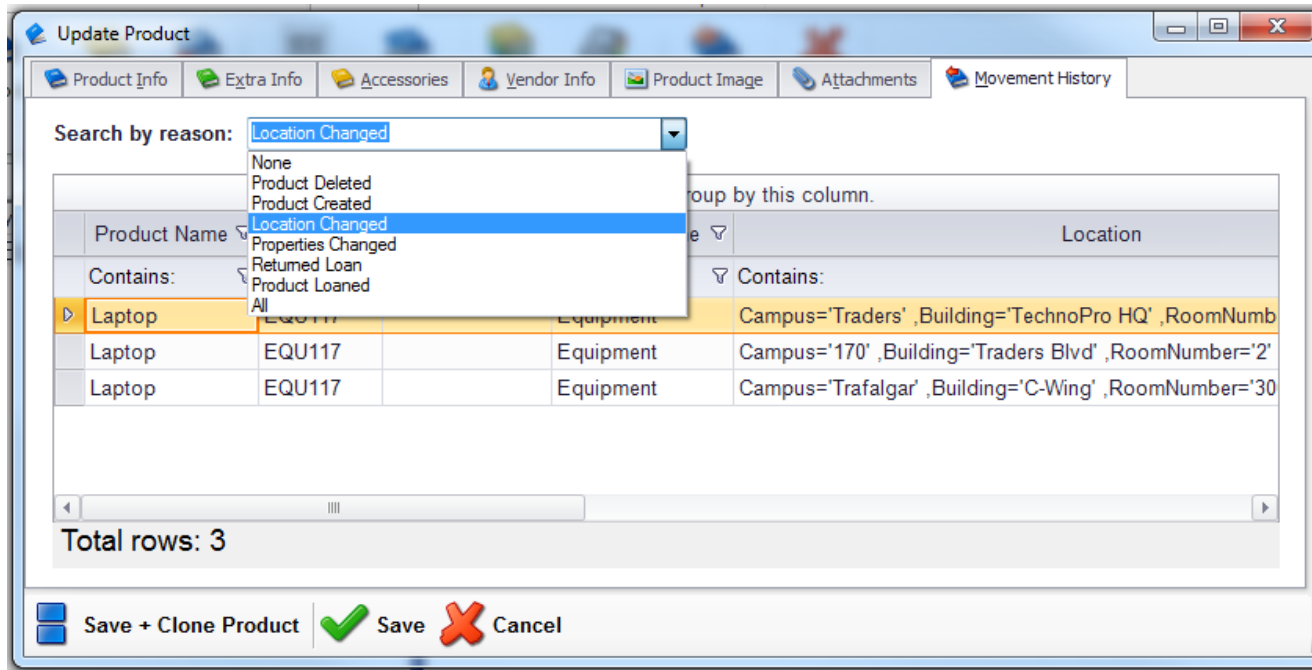


## Attachments



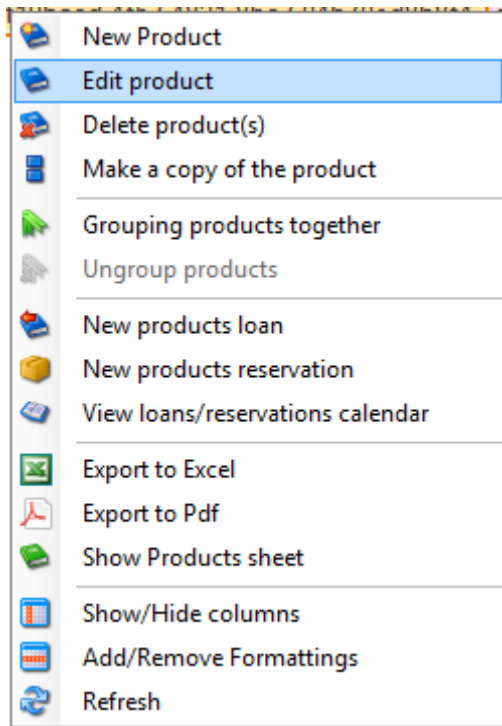
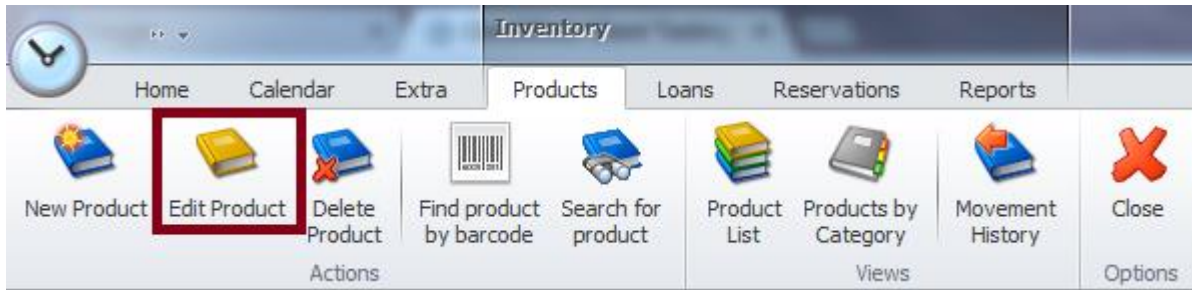
- An attachment can be a manual, technical documents, or a license key.
- You can attach as many documents as you want, in any format.

## Movement History



- A movement history can be viewed in two ways:
  - It's when you create/update a product. See photo on top.
  - Or by clicking the Movement History button on the Products' ribbon bar.
- You can see the change of your product by the date the product was created, deleted, location changed, properties changes, when it was returned, and when it was loaned.

# Edit Product

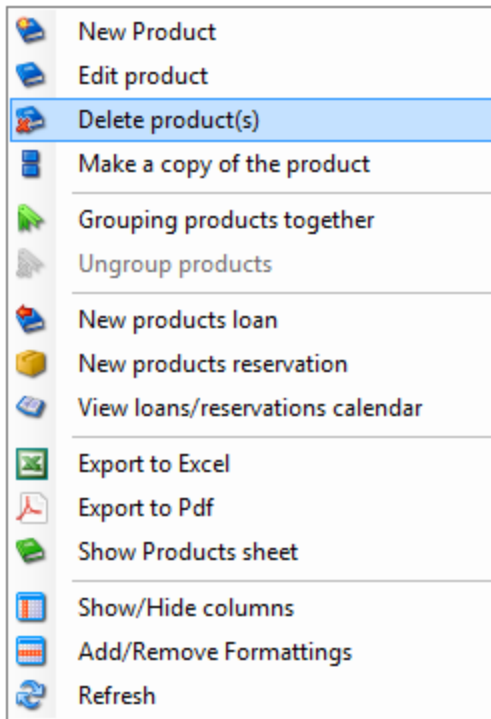
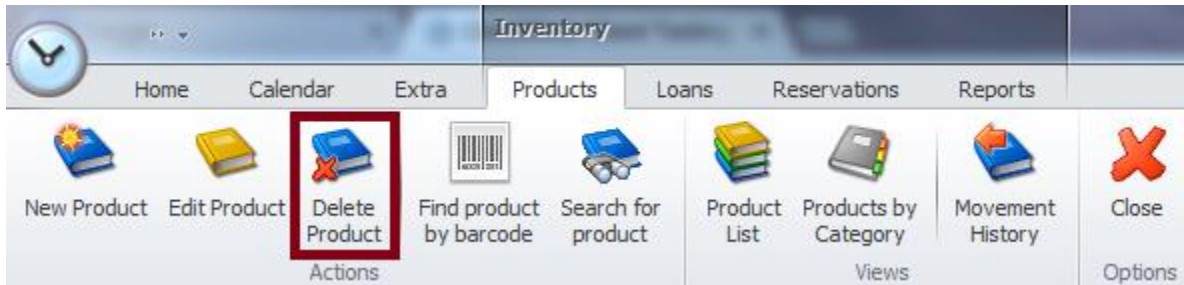


There are two ways to edit a product:

- You can use the button on top of the screen
- Or you can right-click on the product in the Product List screen.
- Select Edit Product



# Delete Product

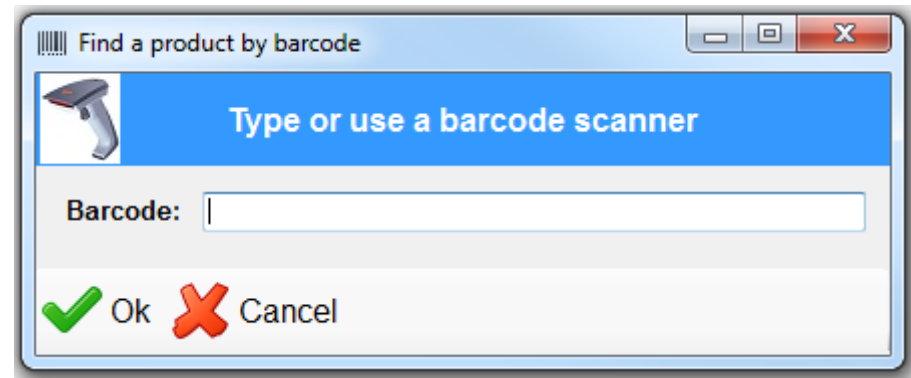


There are two ways to delete a product.

- You can use the button on top of the screen
- Or you can right-click on the product in the Product List screen.
- Select Delete Product

# Find product by barcode

- To find a product by barcode, there's a button in the Products' ribbon bar that says 'Find product by barcode'
- You can simply search a product by typing in the barcode number
- Or you scan the barcode to find the product in the inventory
- The product information screen will appear

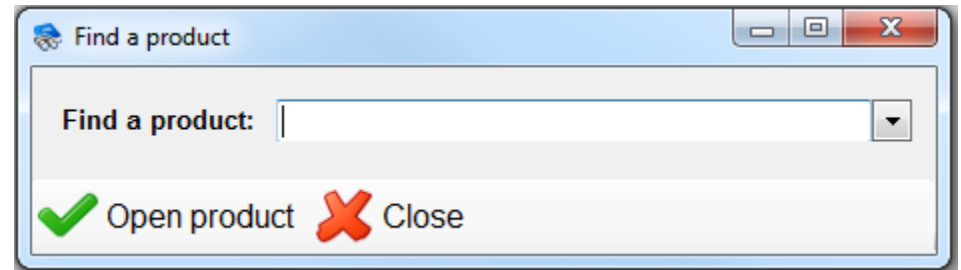


# Search for product

- To search for a product, there's a button in the Product ribbon bar that says 'Search for product'



- You can type in anything related to that product
- Such as Name, Serial Number, Category, Location or by Vendor
- The product information screen will appear



# Product List

The screenshot shows the ClockWork Inventory software interface. The top navigation bar includes 'Home', 'Calendar', 'Extra', 'Products', 'Loans', 'Reservations', and 'Reports'. The 'Products' menu is open, highlighting the 'Product List' option. Below the menu is a search bar and a 'Books' button. The main area displays a table of inventory items with columns for Product ID, Name, Serial Number, Bar Code, Loaned, Status, Category, Vendor, Location, Group, In charge person, and Accessories. Two items are listed: '92 Math' and '93 Biology'. The '93 Biology' item is highlighted in yellow.

Product Id	Name	Serial Number	Bar Code	Loaned	Status	Category	Vendor	Location	Group	In charge person	Accessories
92	Math	12345	BO092	<input type="checkbox"/>	Normal	Books	TechnoPro	Campus='170' ,Building='Traders Blvd' ,RoomNumber='2' ,Seat='5'	TechnoPro	KRYSTEL OCAMPO	
93	Biology	1234523	BO093	<input type="checkbox"/>	Normal	Books	TechnoPro	Campus='170' ,Building='Traders Blvd' ,RoomNumber='2' ,Seat='5'	TechnoPro	KRYSTEL OCAMPO	

- The Product List will give you all the products that you currently have in your inventory.
- It will display the products by Catalogs
- You can filter this list by Product ID, Name, Serial Number, Bar Code, Loaned, Status, Category, Vendor, Location, Group, In charge person, and by Accessories.
- You can double-click on a product to view their information
- You can also right-click and make changes in your inventory in the Product List
- Such as, to create a new product, edit a product, delete a product, make a copy of the product, group the products, make a loan or a reservation, export to excel or pdf, and to show products sheet

# Products by Category

The screenshot shows the 'Inventory' application interface. The top navigation bar includes 'Home', 'Calendar', 'Extra', 'Products', 'Loans', 'Reservations', and 'Reports'. The 'Products' menu is open, showing options like 'New Product', 'Edit Product', 'Delete Product', 'Find product by barcode', 'Search for product', 'Product List', 'Products by Category' (highlighted with a red box), 'Movement History', and 'Close'. Below the navigation bar, there is a search bar and a list of categories with 'Books' selected. A table displays two book entries with columns for Product ID, Unique Id, Name, Serial Number, Bar Code, Loaned, Status, and Category.

Product Id	Unique Id	Name	Serial Number	Bar Code	Loaned	Status	Category
92	46ae3f99-5e55-4db4-9b69-0f2bcb819002	Math	12345	BO092	<input type="checkbox"/>	Normal	Books
93	d53eccc-9bb1-476a-9c49-d7ae55155b12	Biology	1234523	BO093	<input type="checkbox"/>	Normal	Books

- The Products by Category opens another tab to segregate products by categories and sub-categories.
- You can filter this list by Product ID, Name, Serial Number, Bar Code, Loaned, Status, Category, Vendor, Location, Group, In charge person, and by Accessories.
- You can double-click on a product to view their information
- You can also right-click and make changes in your inventory in the Product List
- Such as, to create a new product, edit a product, delete a product, make a copy of the product, group the products, make a loan or a reservation, export to excel or pdf, and to show products sheet

# Movement History

Update Product

Product Info Accessories Vendor Info Product Image Attachments Movement History

Search by reason: Location Changed

Drag a column here to group by this column.

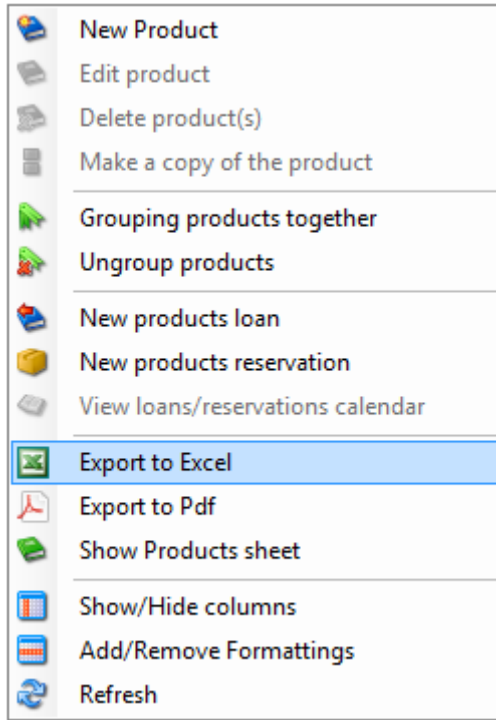
Product Name	BarCode	SerialNumber	CategoryName	Location	In charge person	Group Name
Contains:	Contains:	Contains:	Contains:	Contains:	Contains:	Contains:
Biology	BOO85	12345	Books.Textbooks.Science		KRYSTEL OCAMPO	
Biology	BOO85	12345	Books.Textbooks.Science	Campus='170' ,Building='Traders Blvd' ,RoomNumber='2' ,Seat='5'	KRYSTEL OCAMPO	
Biology	BOO85	12345	Books.Textbooks.Science		KRYSTEL OCAMPO	Staff2

Total rows: 3

Save + Clone Product Save Cancel

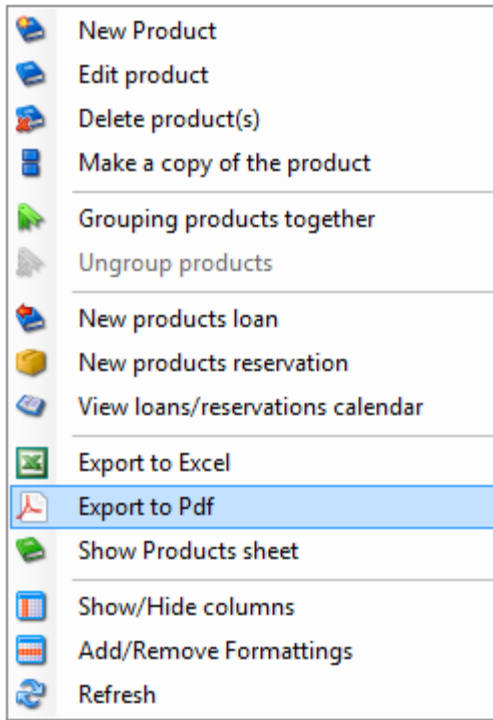
A Movement History is a process that displays all the events and changes of the product including the location or status; it is an important feature because it enables you to keep track of the location and condition of your product in case if it's lost or damaged.

# Export to Excel



- You can export the entire Product List to Excel by selecting the Export to Excel when you right click
- This will give you all the fields in the Product List, in an Excel format

# Export to PDF



• You can export the entire Product List to PDF by selecting the Export to PDF when you right click

format

• This will give you all the fields in the Product List, in a PDF




# Show Products Report

- In the Product List, right-click and select Show Product Report to view this report on the right.
- This report will give you a summary of the product you've selected.
- It includes the product information and the product's image.


April 8, 2013

## Product Sheet

Product name: Biology  
Product Id: 85  
Owner: KRYSTEL OCAMPO



B0085



**Description**  
.

**Notes**  
.

**Main properties**

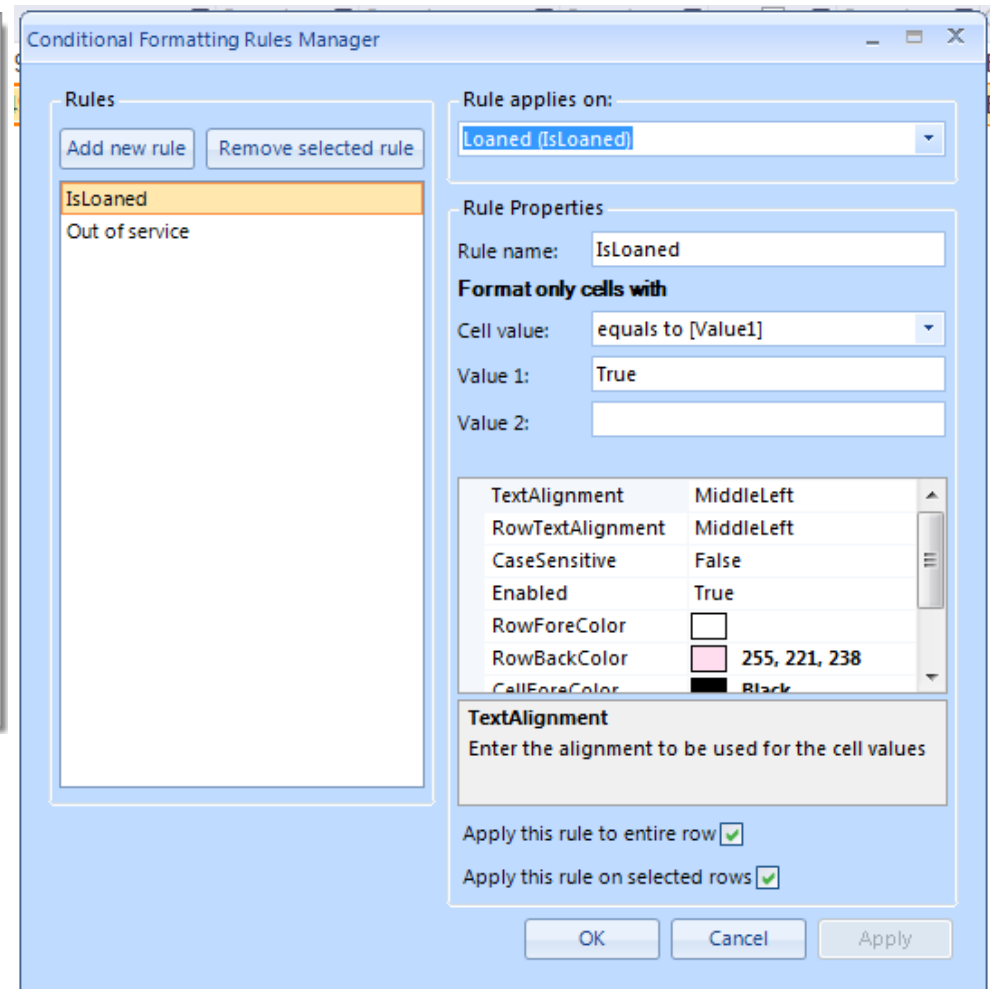
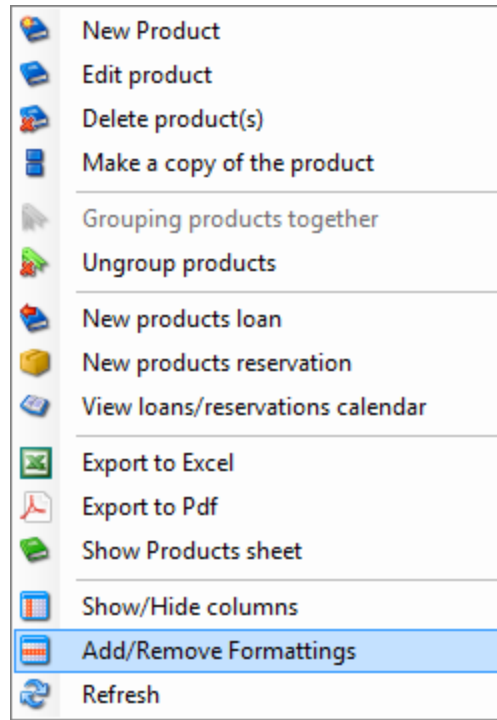
<b>Unique Id</b>	34c554c2-53cc-4338-8ef7-764d78ddbbdd
<b>Category</b>	Books.Textbooks.Science
<b>Barcode</b>	B0085
<b>Serial Number</b>	12345
<b>Status</b>	Normal
<b>Group</b>	Staff2
<b>Location</b>	
<b>Is loaned</b>	No

---

Page 1

# Add/Remove Formatting

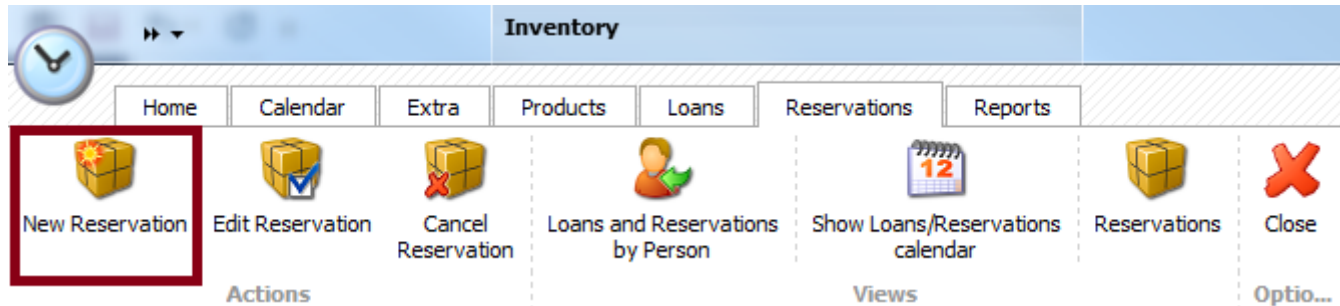
- In the Product List, you can highlight a column or a row by their value.
- Let's say if the product is loaned, the row color will be pink because I assigned the RowForeColor to be pink.



# RESERVATIONS

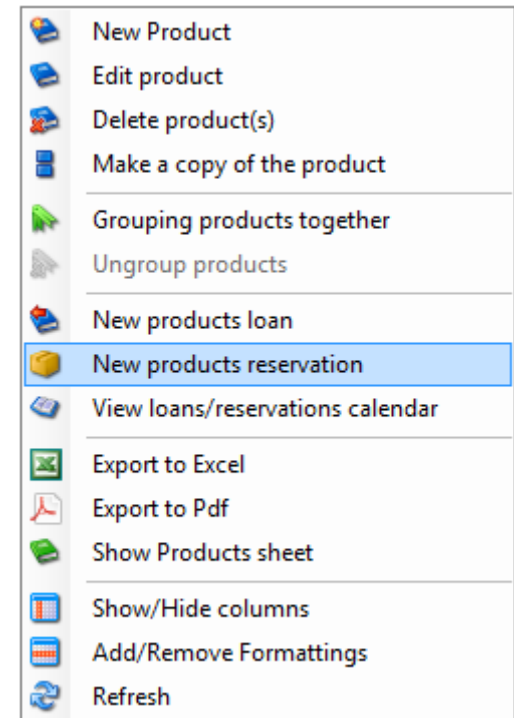
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# Create a Reservation



Sometimes, a student is not ready to borrow an item yet or the item might not be available at the time. This student needs to make a reservation.

- To add a reservation, right-click the product and select New Products Reservation
- Or use the button on top of the screen.



# Edit a Reservation



The 'Edit products reservation' dialog box displays the following information:

- Reservation made by **KRYSTEL OCAMPO** on April 11, 2013
- From: April 11, 2013
- To: April 12, 2013
- Comma-separated list of notification emails: [Empty field]
- Be notified
- Reserved for: OCAMPO, KRYSTEL . KRYSTEL
- Notes: [Empty text area]
- Reserved product list:
  - a (BO094)  
Unique Id: b259a4eb-0b1f-4ac7-8722-8bfc3aa22af3  
Name: a  
Serial number:  
Barcode: BO094  
Is Loaned: False  
Status: Normal  
Category: Books  
In charge person: KRYSTEL OCAMPO
- Buttons: Save (green checkmark) and Close (red X)

- You can edit a loan by using the button on top of the screen.
- A screen with summary information will then appear.
- Everything is editable except for the product information and who it's reserved for.

# Show Reservations

The screenshot shows the 'Inventory reservations - ClockWork' interface. The 'Reservations' icon is highlighted with a red box. Below the navigation bar is a search bar and a date range selector for 'mon March 4 - fri October 4'. A table displays reservation data with columns for Product Id, Product name, Product serial number, Product barcode, Start date, End date, Reservation Notes, Reserved to, Reserved by staff, Product category, and Catalog.

Product Id	Product name	Product serial number	Product barcode	Start date	End date	Reservation Notes	Reserved to	Reserved by staff	Product category	Catalog
94	a		BO094	Apr 11, 2013 . 12:00 AM	Apr 12, 2013 . 12:00 AM		KRYSTEL OCAMPO	KRYSTEL OCAMPO	Books	Books
94	a		BO094	Apr 12, 2013 . 12:00 AM	Apr 13, 2013 . 12:00 AM		KRYSTEL OCAMPO	KRYSTEL OCAMPO	Books	Books

- Reservations gives you the list of all the products that are currently reserved from all Catalogs.
- You can filter this list by Product ID, Product name, Product serial number, Product barcode, start date, end date, reservation notes, reservation to, reserved by staff, Product category, and which Catalog it belongs to.
- You can double-click on a product to edit
- You can also double-click to view the information on the reserved product

Inventory

Home Calendar Extra Products Loans Reservations Reports

New Reservation Edit Reservation Cancel Reservation Loans and Reservations by Person Show Loans/Reservations calendar Reservations Close

Search: [ ] [Me] [Books by category] [Inventory reservations] [Inventory reserv]

mon March 4 - fri October 4  
Go to: [This week](#) | [Next week](#) | [Two weeks](#) | [This month](#) | [This term](#) | [Today](#) | [Tomorrow](#) | [Choose date](#)

Product Id	Product name	Product serial number	Product barcode	Start date	End date
94	a		BOO94	Apr 11, 2013 12:00 AM	Apr 12, 2013

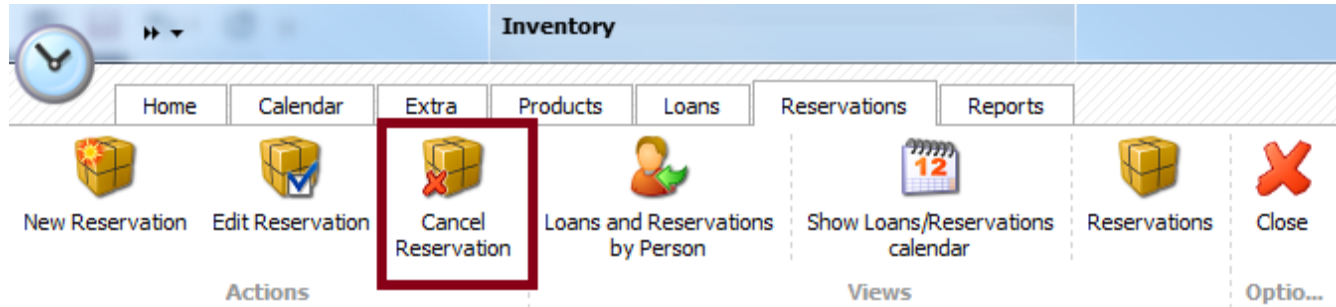
- Open Reservation
- Make Loan
- Mark as completed
- Cancel Reservation
- Export to Excel
- Export to Pdf
- Refresh
- Show/Hide columns
- Add/Remove Formattings

- If you right-click, you can loan a reserved product

- You can also mark a reserved product as completed

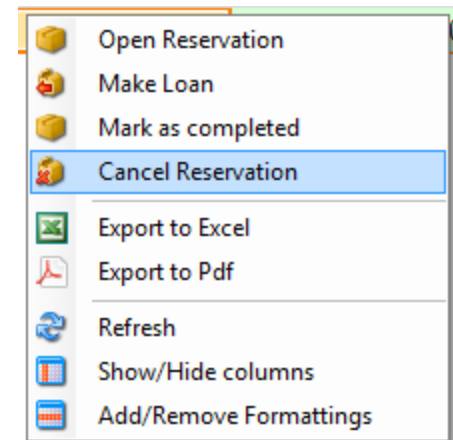
Let's say the reservation date is done and there's still no available product to be loaned, you would want to mark a reservation as completed.

# Cancel a Reservation



You have two options to cancel a reservation...

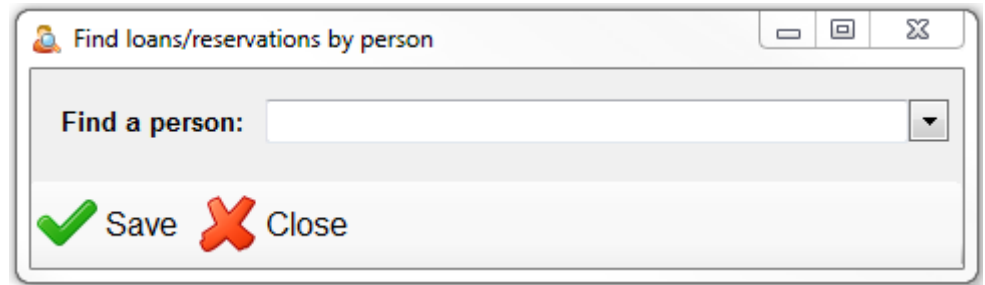
- First, select the product that you want to cancel
- Then use the button at the top
- Or right-click and select Cancel Reservation



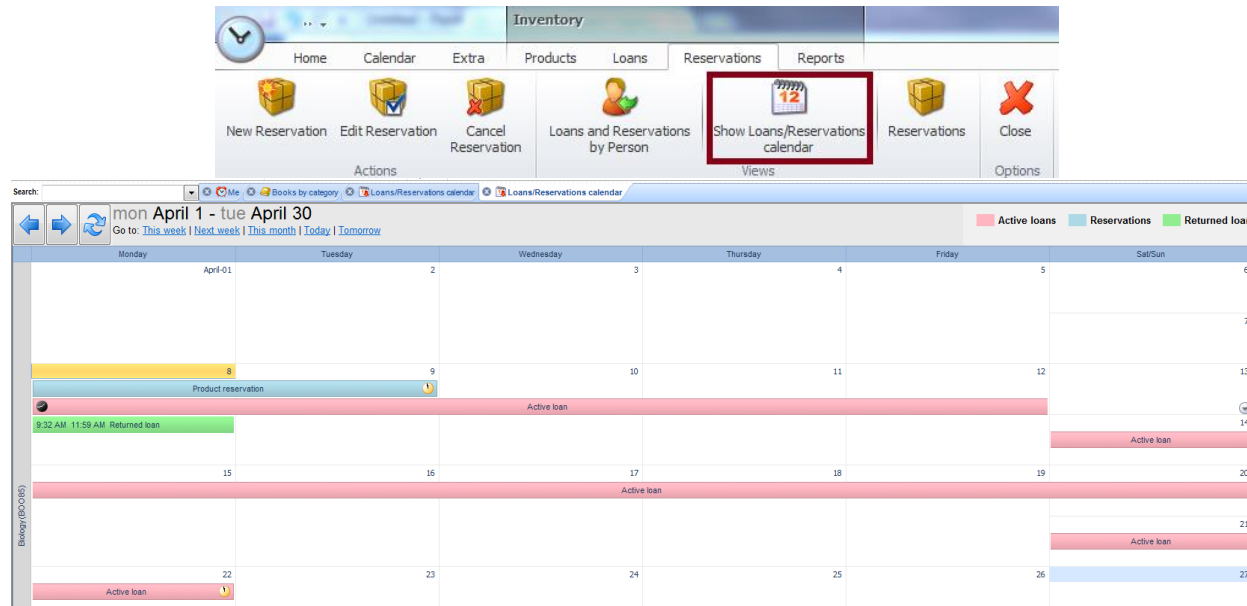


# Loans and Reservations by Person

- Loans and Reservations by Person, let's you search for a loan or a reservation by the person's first name or last name.
- So let's say that I typed in my name, I'm only going to see my loaned products and my reservations.



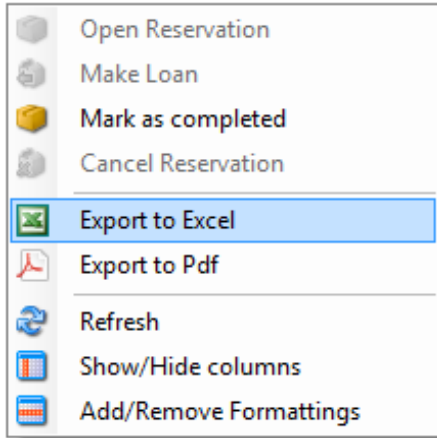
# Show Loans/Reservations calendar



This is the graphical calendar view.

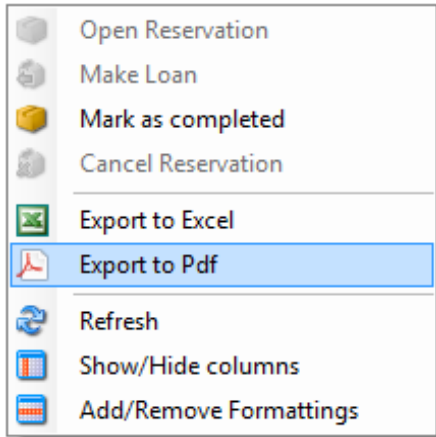
- It can be viewed by weeks or months.
- The product name is on the side, the dates on top, and the length of time an item is borrowed as bars.
- To change the date, you can adjust the bars.
- The blue bar is for your active reservations.
- Select multiple products to see more than one product in the Loans/Reservation Calendar

# Export to Excel



- You can export the entire Reservations list to an Excel by selecting the Export to Excel when you right click
- This will give you all the fields in the Reservations, in an Excel format

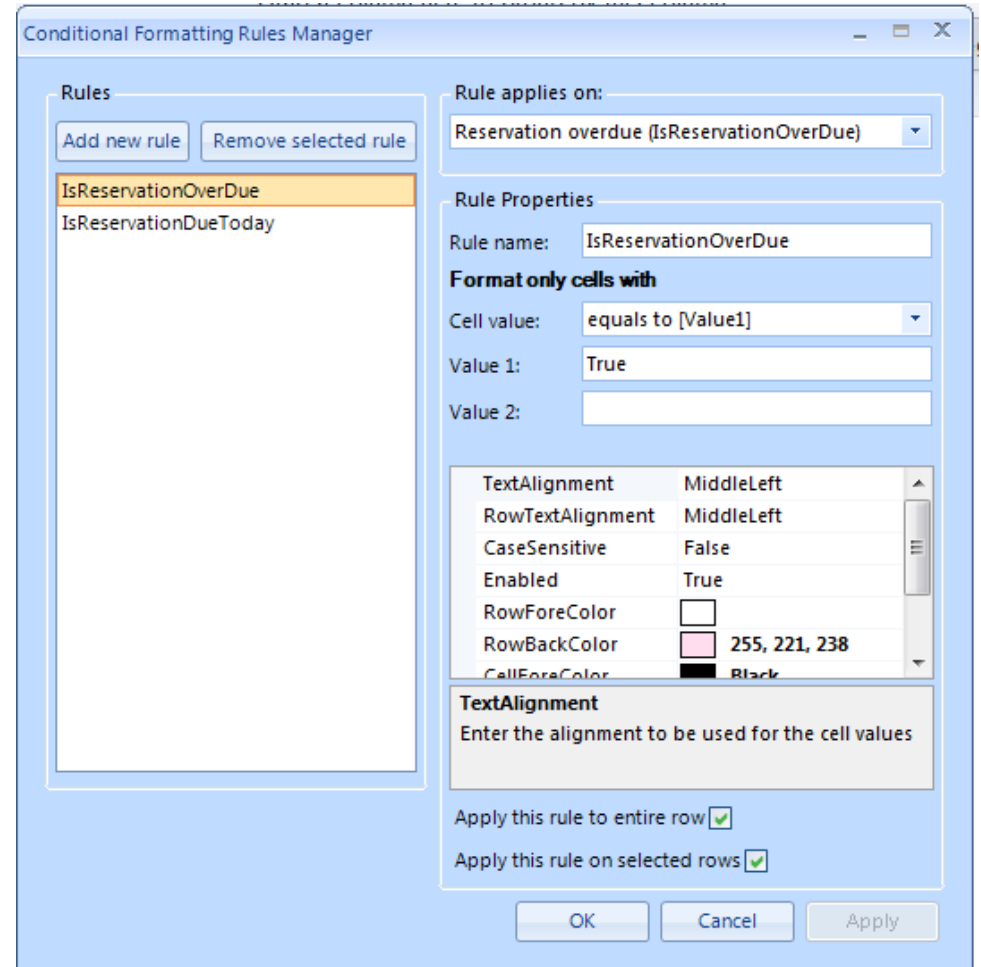
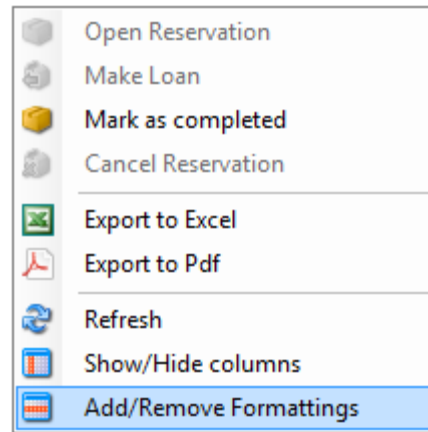
# Export to PDF



- You can export the entire Reservations list to a PDF by selecting the Export to PDF when you right click
- This will give you all the fields in the Reservations, in an PDF format

# Add/Remove Formatting

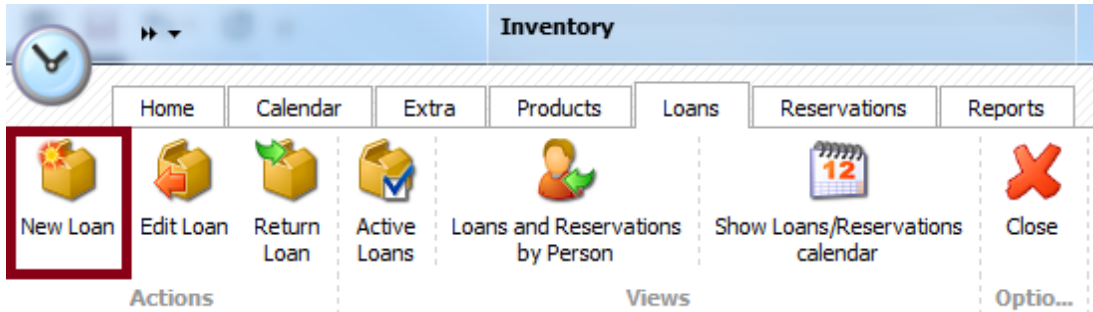
- In the Reservations, you can highlight a column or a row by their value.
- Let's say if the product reservation is overdue, the row color will be pink because I assigned the RowForeColor to be pink.



# LOANS

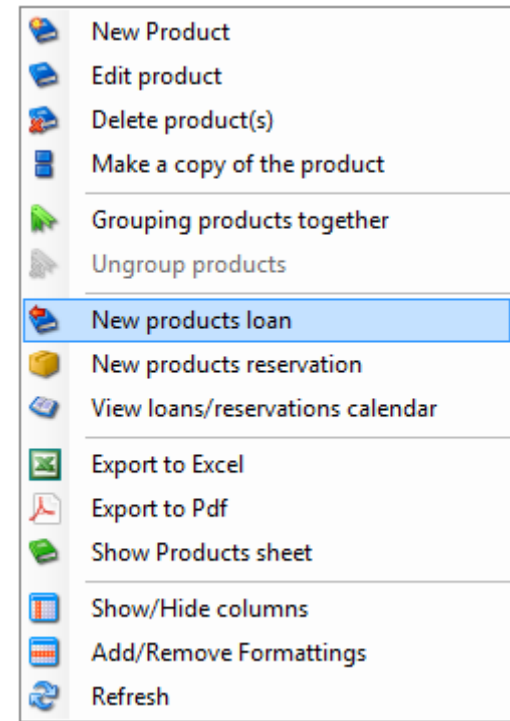
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# Create a Loan



There are two ways to make a loan.

- You can use the button on top of the screen
- Or you can right-click on a product in the Product List screen.
  - Select New Products Loan



New products loan

Loan made by **KRYSTEL OCAMPO** on April 11, 2013

Due date: April 25, 2013

Loaned to: OCAMPO, KRYSTEL . KRYSTEL

Notes:

Location:

Campus:  
Building:  
Room number:  
Seat:  
Notes:

List of loaned products

Add products Add products in same group Remove products

Drag a column here to group by this column.

Double-booked info	Name	Group	Accessories	Serial Number	Bar Code	Status	Category	Location	L
View double-booked	a		Contains:	Contains:	Contains:	Normal	Books		E

Total rows: 1

Create a Loan Close

**Loaned to:** The person the product is loaned to

**Location:** To add the location of the product

**Double-booked:** When an item is double booked, the system warns you. Clicked on the "View double-booked" to display the message. When its greyed out, like in this image, it means that there's no double-booked message available.

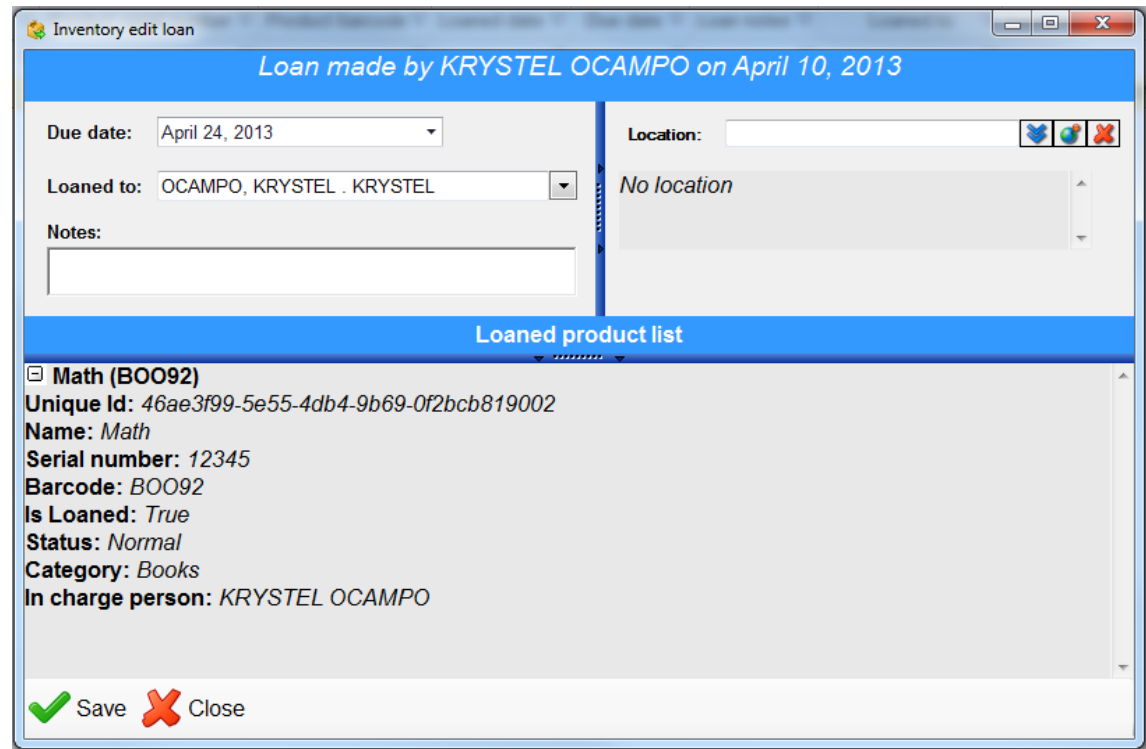
To keep track of the condition of your product, you may want to add the status of the product to its current state.

**Status:** To change the status of the product, double-clicked on status



# Edit Loan

- You can edit a loan by using the button on top of the screen.
- A screen with summary information will then appear.

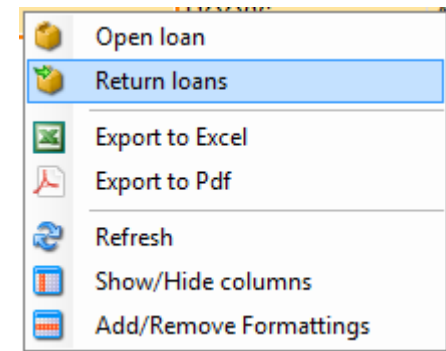


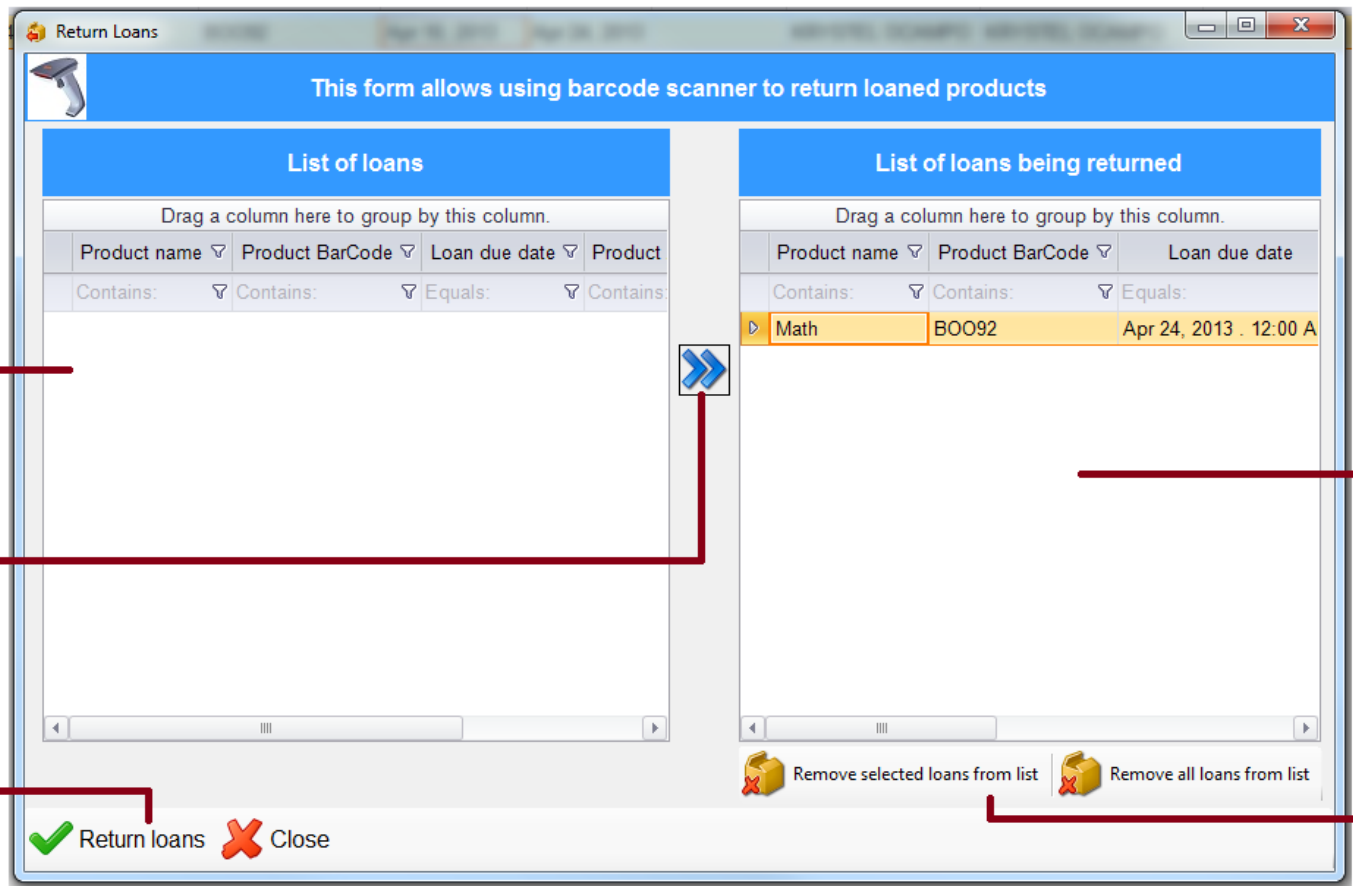
# Return a Loan



There are two ways to return a loan.

- You can use the button on top of the screen
- Or you can right-click on the product in the Active Loans screen.
  - Select Return Loans





Products that has been removed from the loans being returned

To add the product back in the list to be returned.

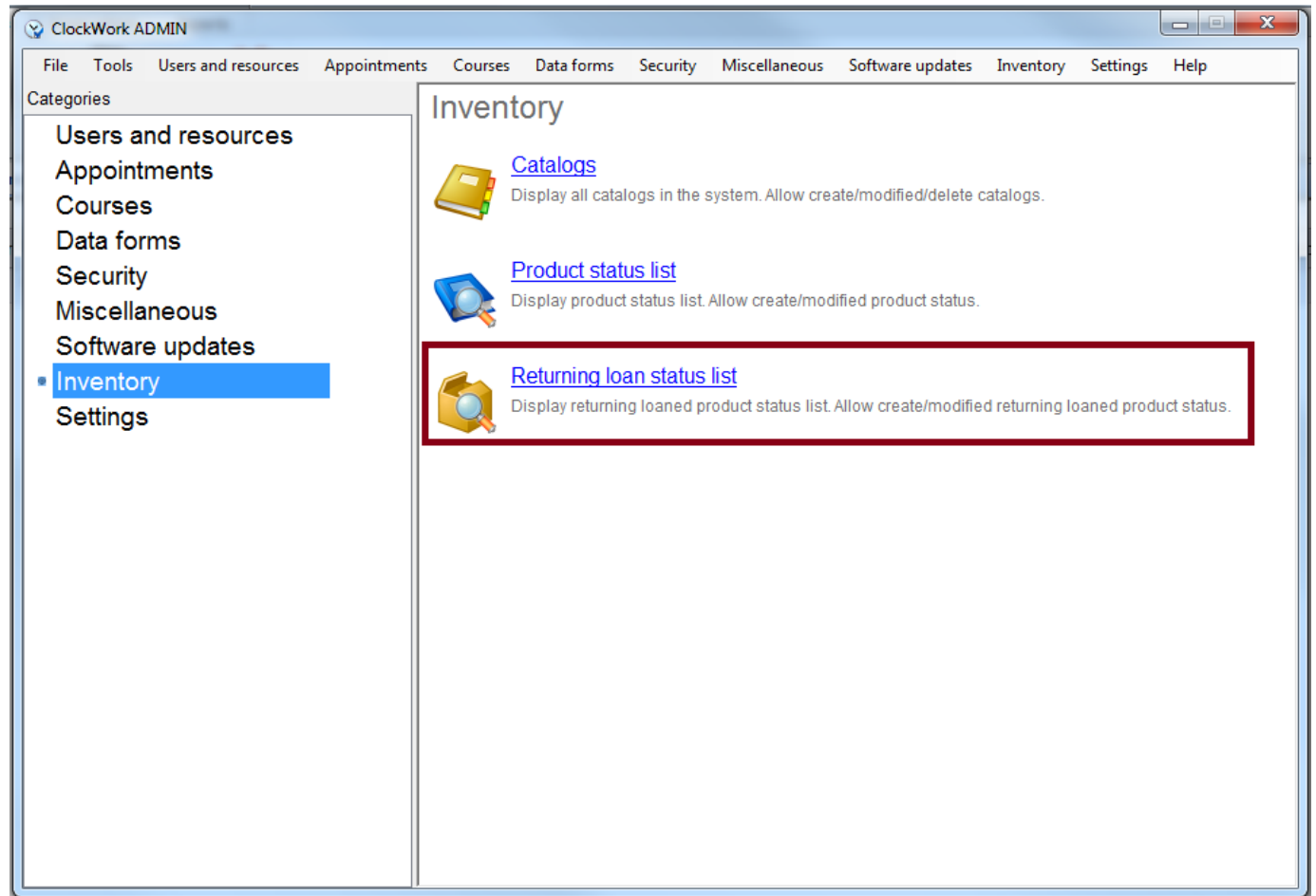
Select the **Return Loans** to return the product

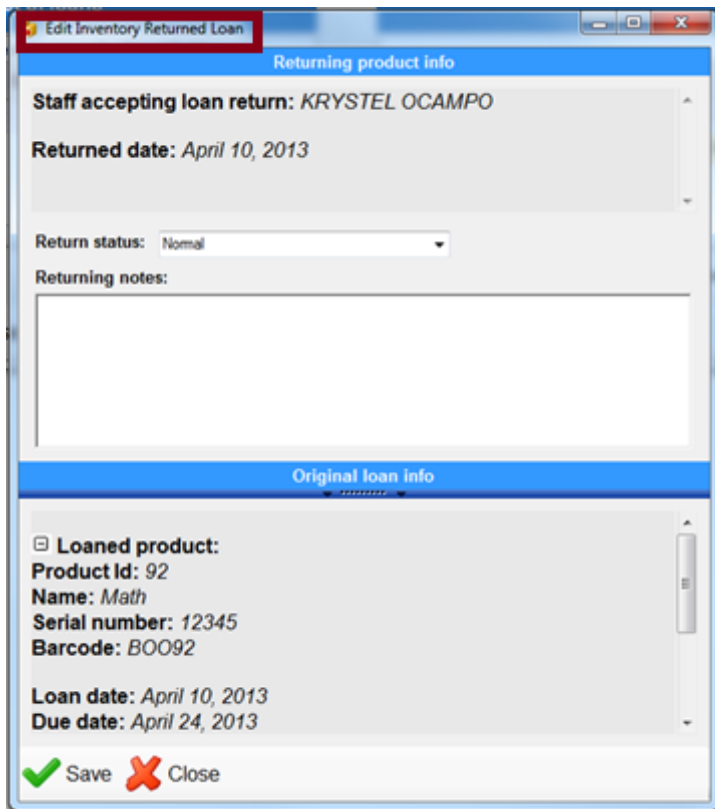
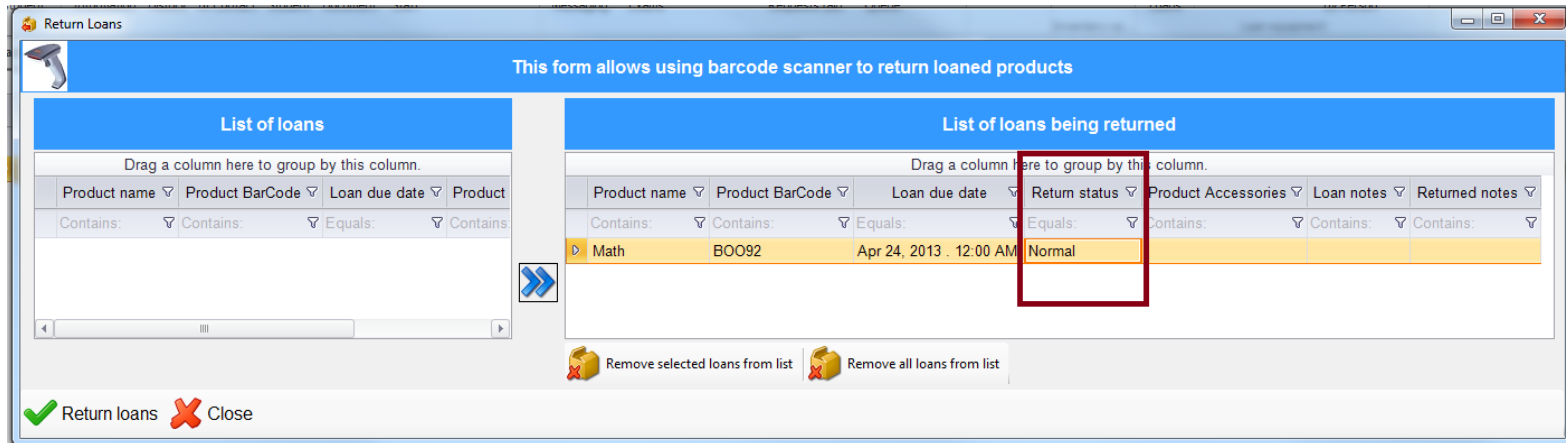
List of loaned products that are being returned

To move a loaned product back to the list of loans and remove it from list of loans being returned,

# Loan Status

- To change the menu for the loan status, go to ClockWork Admin > Inventory > Loan Status List
- See page 48 and 53





- To change the return loan status, double click on the loaned product that is being returned
- You should get a form with Edit Inventory Returned Loan as a heading
- Edit the loan status from here

# Active Loans



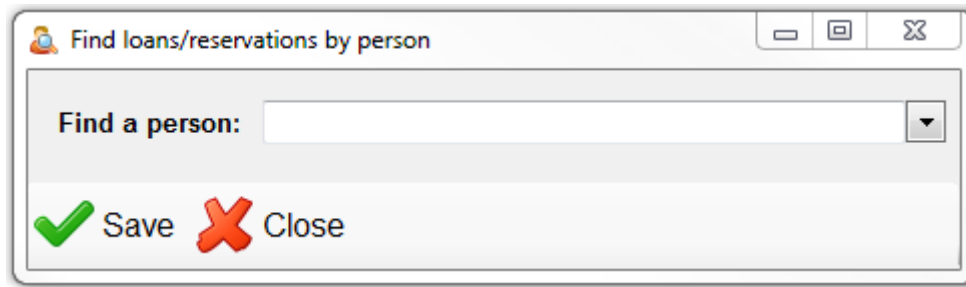
- Active Loans gives you the list of all the products that are currently loaned from all the catalogs.
- You can double-click on a product to view their information

A screenshot of the ClockWork software interface showing the 'Active Loans' list. The interface includes a search bar, a navigation bar, and a table of active loans. The table has columns for Product Id, Product name, Product serial number, Product barcode, Loaned date, Due date, Loan notes, Loaned to, Loan made from staff, Loan location, Loan overdue, Product category, Catalog, and Product Accessories. The first row of data is highlighted in yellow.

Product Id	Product name	Product serial number	Product barcode	Loaned date	Due date	Loan notes	Loaned to	Loan made from staff	Loan location	Loan overdue	Product category	Catalog	Product Accessories
94	a		BO094	Apr 11, 2013	Apr 25, 2013		KRYSTEL OCAMPO	KRYSTEL OCAMPO		<input type="checkbox"/>	Books	Books	

- You can filter this list by Product ID, Unique ID, Name, Serial Number, Bar Code, Loaned, Status, Category, Vendor, Location, Purchase date, Purchase amount, warranty expiration date, Purchase Information, Location, Location date, Group, In charge person, and by Accessories.

# Loans and Reservations by Person

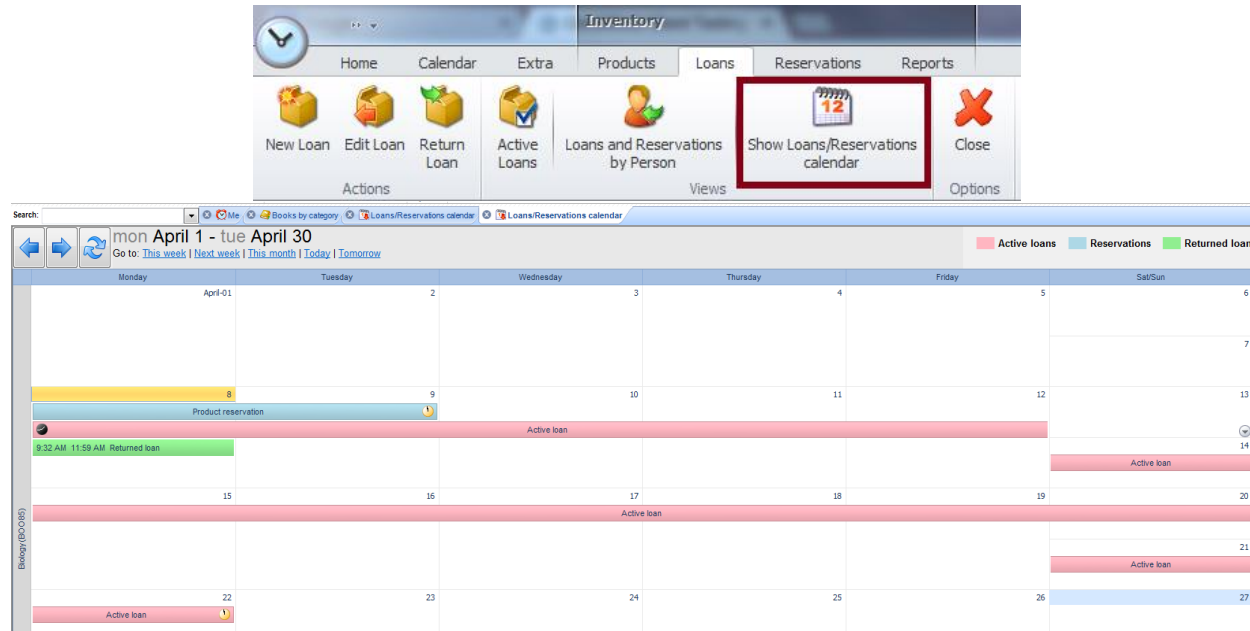


- Loans and Reservations by Person, let's you search for a loan or a reservation by the person's first name or last name.
- So let's say that I typed in my name, I'm only going to see my loaned products and my

reservations.

- It will filter the list of loans and reservations by name

# Show Loans/Reservations calendar

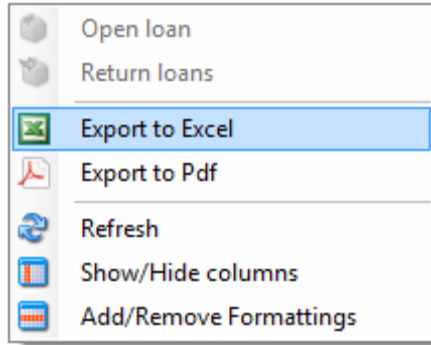


This is the graphical calendar view.

- It can be viewed by weeks or months.
- The product name is on the side, the dates on top, and the length of time an item is borrowed as bars.
- To change the date, you can adjust the bars.
- The red bar is for your active loans.
- Select multiple products to see more than one product in the Loans/Reservation Calendar

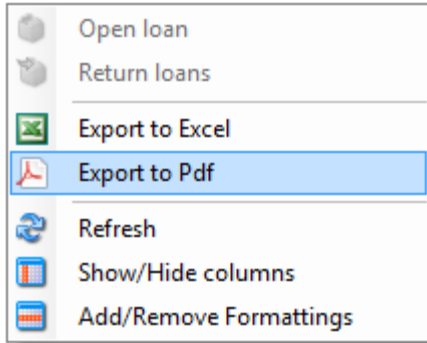


# Export to Excel



- You can export the entire Active Loan list by selecting the Export to Excel when you right click
- This will give you all the fields in the Active Loans, in an Excel format

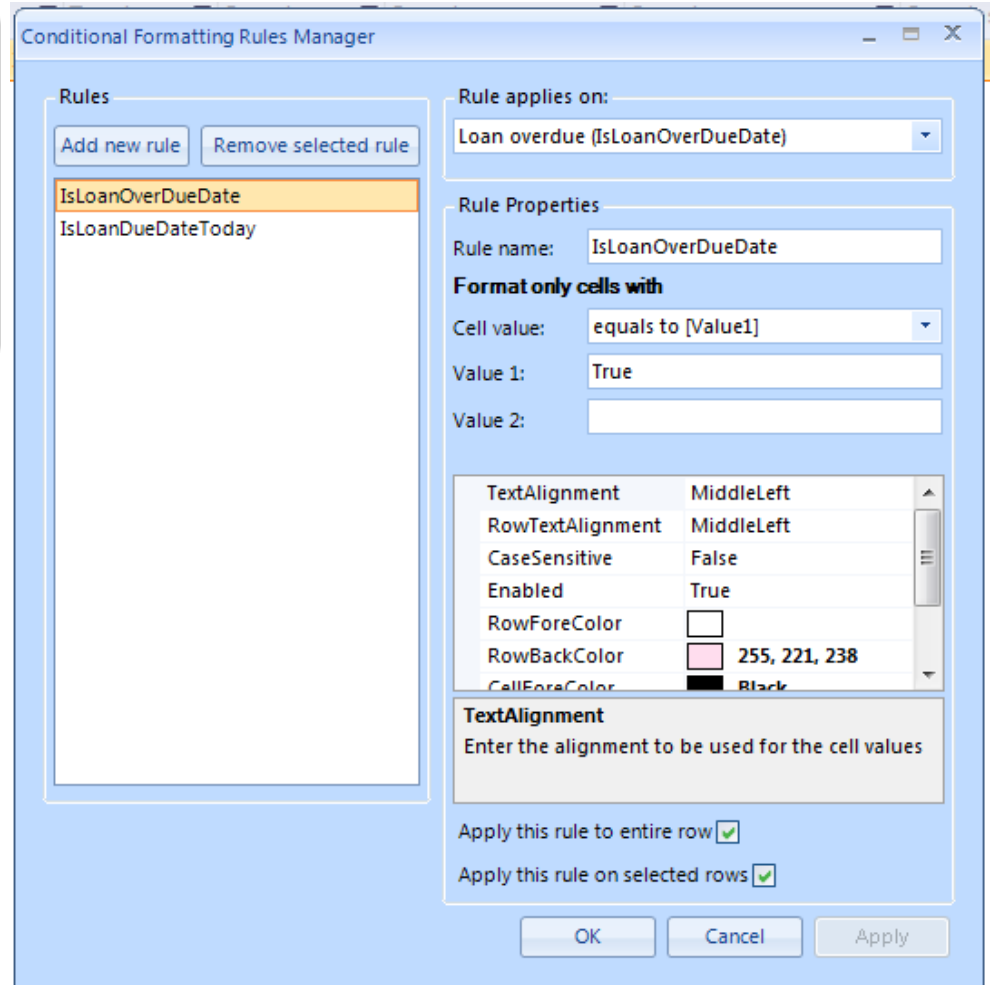
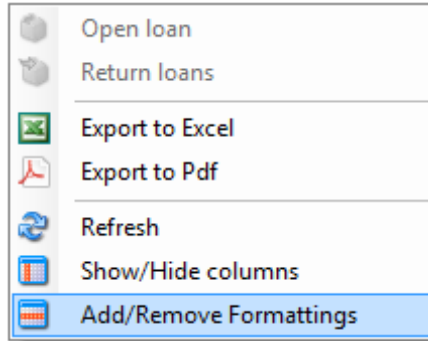
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- You can export the entire Active Loan list by selecting the Export to PDF when you right click
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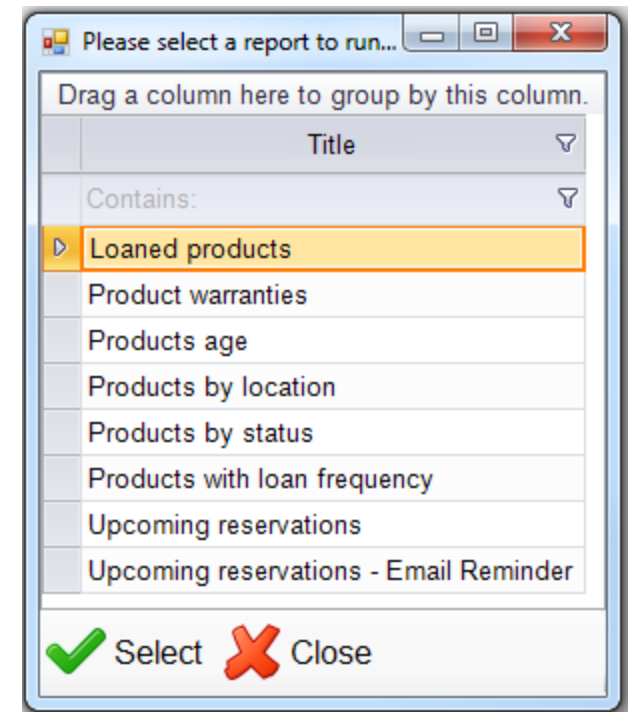
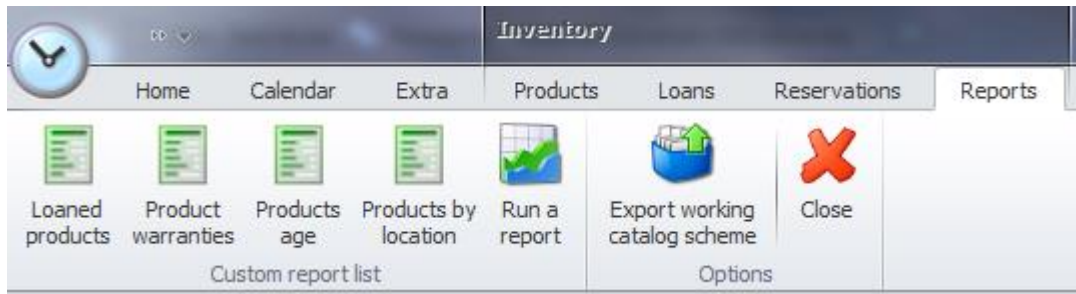
# Add/Remove Formatting

- In the Active Loans, you can highlight a column or a row by their value.
- Let's say if the product is loan is overdue, the row color will be pink because I assigned the RowForeColor to be pink.



# REPORTS

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- In Reports, automatically they would be four reports that will be displayed on the ribbon bar this is for easy access for the most used reports
- There's also a button called Run a report to run the remaining hidden reports.

# OTHER FEATURES

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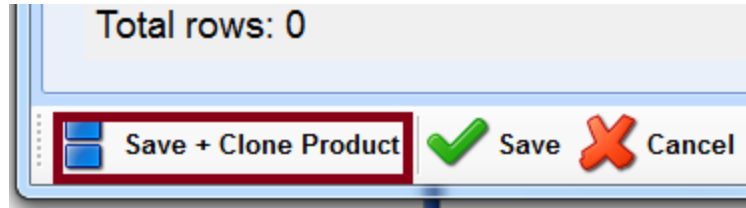
# Drag and Re-size

The screenshot displays the 'Loans/Reservations calendar' in the ClockWork software. The interface includes a top navigation bar with tabs for 'Tests & Exams', 'Inventory', and 'Loans/Reservations calendar'. Below this is a toolbar with icons for 'New Product', 'Edit Product', 'Delete Product', 'Find product by barcode', 'Search for product', 'Product List', 'Products by Category', 'Movement History', and 'Close'. A search bar is located below the toolbar. The main area shows a calendar for the week of June 24 to July 23. The calendar grid has columns for days of the week and rows for dates. A legend indicates that pink bars represent 'Active loans', blue bars represent 'Reservations', and green bars represent 'Returned loans'. Several pink bars are visible, indicating active loans for various dates. A yellow bar highlights the date June 25. A legend in the top right corner shows 'Active loans' (pink), 'Reservations' (blue), and 'Returned loans' (green).

- You can change the date by dragging the end of the bar and moving it to re-size the length.

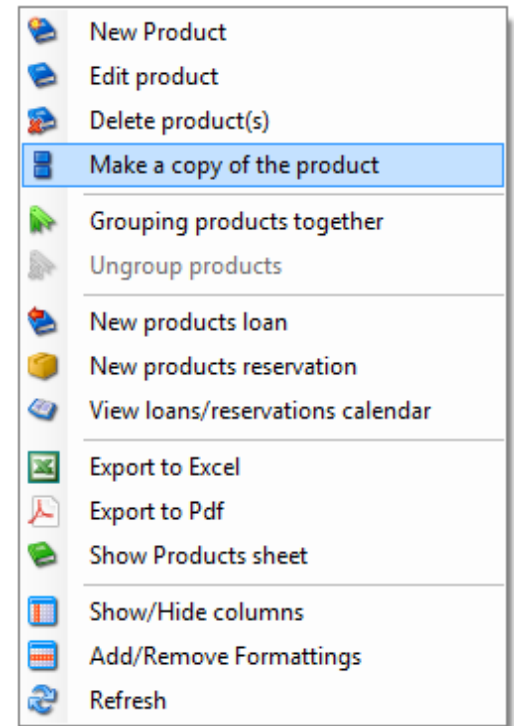
## Copy of the Product

- Instead of typing in the information for a similar product, you can copy or clone this product in the Product List



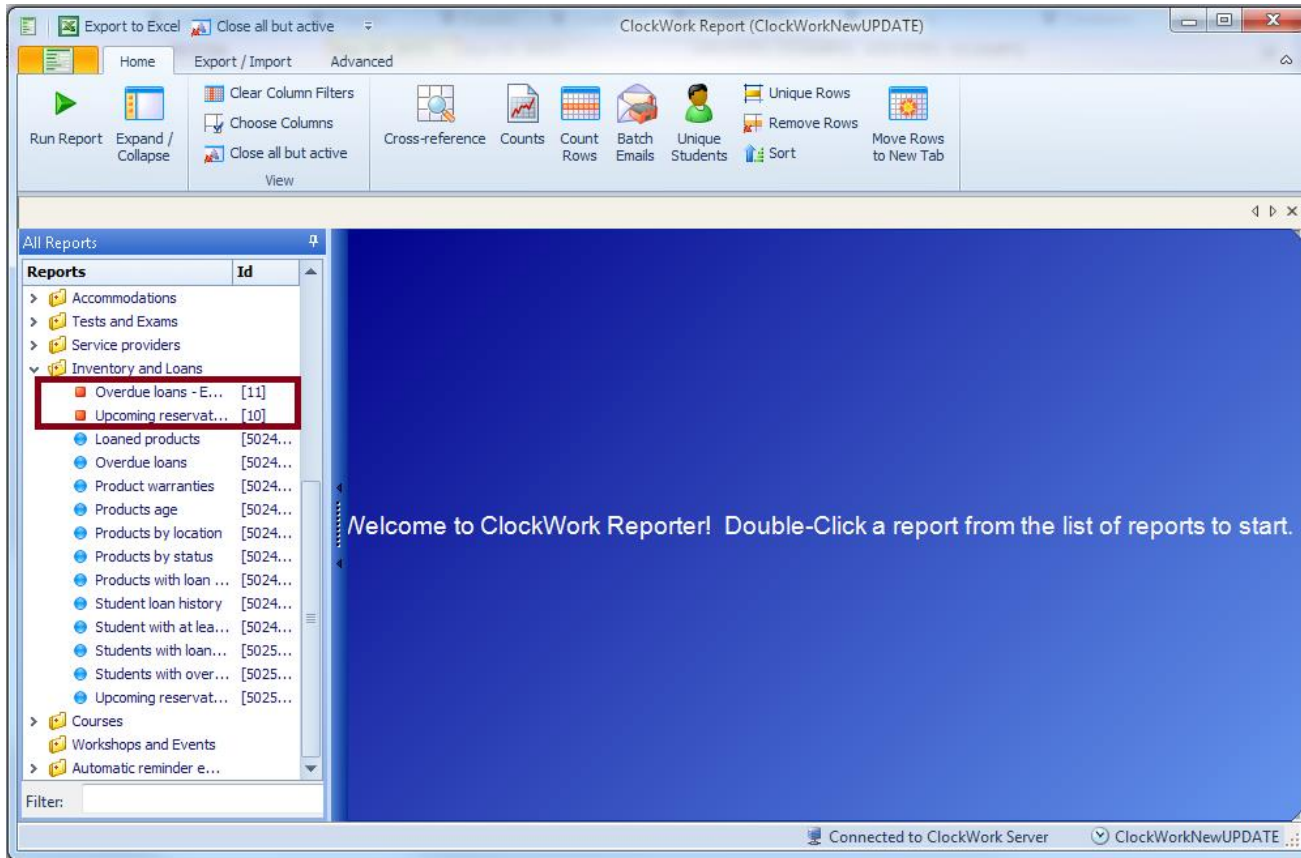
There are two ways in cloning a product:

- In the Product List, you can right-click on a selected product
  - Select Make a copy of the product
- Or when you open the product, there's a Save + Clone Product button



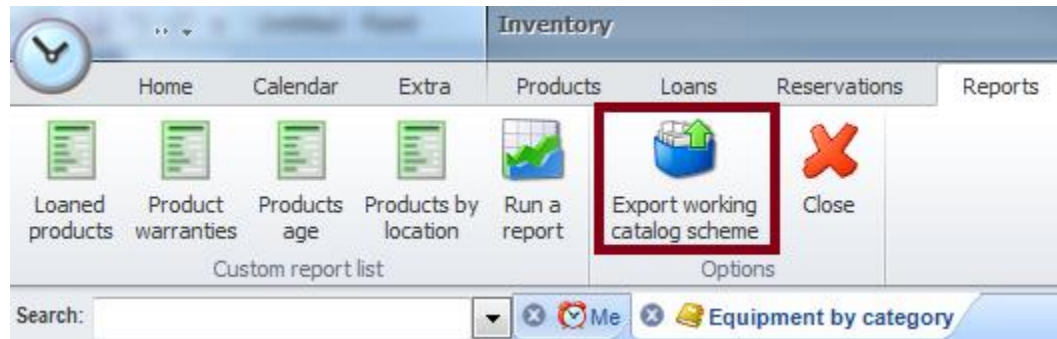


# Batch Email



- There are two emails that get sent out to students:
  - Reminder email when a loan is overdue
  - Reminder email when for an upcoming product reservation

## Export working catalog scheme



- After creating the structure of your Catalogs, you can export this and save it on your computer.
- You can upload this later when you want to create another Catalog
- See page 7