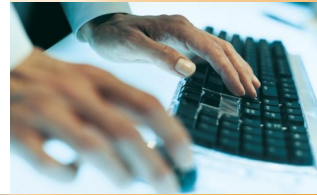
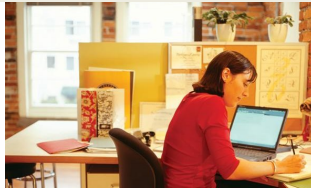


ClockWork Training Service Providers



Service Provider Management

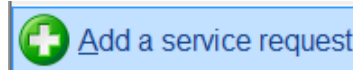
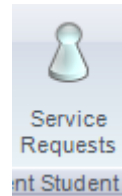
Learning Objectives

- Enter a service request for a student
- Become familiar with the Service Providers Management screen
- Use filtering, sorting and grouping
- Assign a service provider
 - Cancel a service provider
 - Email students / providers
 - Upload / download notes
 - Exporting the list to Excel
 - Generating documents
 - Enter a new service provider
 - Configuring web notetaking settings
 - Logging in as a student

Enter a Service Request

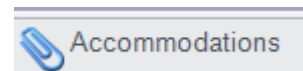
Option A: Use the Service Request screen

1. Select the student you wish to enter a service request for
2. Click the “Service Requests” button located in the home tab of the ribbon bar at the top
3. Click the “Add service request” button at the bottom
4. Select the type of service on the left
5. Optionally select one or more courses and click “Save”



Option B: Use the Accommodations screen

1. Select the student you wish to enter a service request for
2. Click the “Accommodations” button in the ribbon bar at the top
3. Click the “Templates” tab and check the appropriate accommodation(s)
4. Click “Save” or “Generate letters and save”.





Add a new service provider request for

Email the selected request(s) using a

Edit the selected request to assign a provider

View the original

Export the list to Excel

Close this screen

Upload / download notetaking

Reloads the requests or providers listing.

Highlights requests where a potential service provider is

Check Availability Refresh Enter Request Close Email Assign Provider Request View Notetaking Notes Export Generate List Sheets Clear col Filters

Main Selected request Tools

Service provider requests. Each request (by course if applicable) will appear as one row in the list. Requests are marked as "Assigned" once they have been processed.

| Status | AvailabilityStatus | IsAssigned | Last Action Date | Approval D |
|-----------|--------------------|-------------------------------------|------------------|------------|
| Contains: | Contains: | <input checked="" type="checkbox"/> | Contains: | Contains: |
| Pending | | <input type="checkbox"/> | | 2011-01-10 |
| Pending | | <input type="checkbox"/> | | 2011-01-10 |
| Pending | | <input type="checkbox"/> | | 2011-02-04 |
| Pending | | <input type="checkbox"/> | | 2011-02-04 |
| Assigned | | <input checked="" type="checkbox"/> | | 2011-02-04 |

Generate documents

Clears all active column filters

Session

Winter Session 2011 ◀ Now ▶ Set as default

Session chooser— determines which session to show data for.

Auto set grouping options. Grouping will organize the list of requests into

Layout save/load/reset options. Layout includes column visibility, ordering, alias, and width.

Reports— any reports can be published here using the settings.

The screenshot shows the top navigation bar of the application. On the left, there is a 'View' button with a 'Choose Columns' icon. Next to it are two dropdown menus: 'Grouping' and 'Layout'. To the right of these is a 'Reports' section. Arrows from the text blocks above point to these elements: 'Auto set grouping options...' points to the 'Grouping' dropdown, 'Layout save/load/reset options...' points to the 'Layout' dropdown, and 'Reports— any reports...' points to the 'Reports' section.

column here to group by this column.

| ate | Who approved | Student | Type of Request | Course | Funding source | Assigned |
|-------------------|----------------|----------------|-------------------------|-----------|----------------|-----------|
| Contains: | Contains: | Contains: | Contains: | Contains: | Contains: | Contains: |
| Charlene Bartlett | Adams, Brant | Teamer | | | | |
| Charlene Bartlett | Adams, Brant | Teamer | Basket Weaving 4F85 (2) | | | |
| Charlene Bartlett | Dinunzio, Mike | Peer notetaker | Basket Weaving 4F85 (2) | | | |
| Charlene Bartlett | Dinunzio, Mike | Peer notetaker | Baskets 933A lec (10) | | | |
| Charlene Bartlett | Dinunzio, Mike | Peer notetaker | Anthropology 1A01 X (1) | | | Mike 197 |

Hide / show columns

The screenshot shows a table with the following data:

| ate | Who approved | Student | Type of Request | Course | Funding source | Assigned |
|-------------------|----------------|----------------|-------------------------|-----------|----------------|-----------|
| Contains: | Contains: | Contains: | Contains: | Contains: | Contains: | Contains: |
| Charlene Bartlett | Adams, Brant | Teamer | | | | |
| Charlene Bartlett | Adams, Brant | Teamer | Basket Weaving 4F85 (2) | | | |
| Charlene Bartlett | Dinunzio, Mike | Peer notetaker | Basket Weaving 4F85 (2) | | | |
| Charlene Bartlett | Dinunzio, Mike | Peer notetaker | Baskets 933A lec (10) | | | |
| Charlene Bartlett | Dinunzio, Mike | Peer notetaker | Anthropology 1A01 X (1) | | | Mike 197 |

An arrow from the text 'Hide / show columns' points to the 'Who approved' column header.

Service Providers Management Requests Tab

Reloads the list of service providers for the selected type on the left

Edit the intake form for the selected service provider

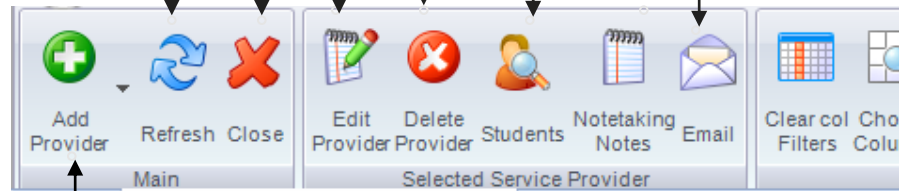
Delete the selected service provider

List of students the selected service provider is assigned to.

Export the list to Excel using

Email selected provider(s) (mail-merge)

Close this screen



Add a new service provider using the intake form.

Service provider types.

Clicking on one of these types will load the list of service providers available for that type. The list of types is editable in the ClockWork Admin

Requests Service Providers

- Interpreter
- Teamer
- Professional notetaker
- Coach
- Specialized tutor
- Real time captioner
- Peer assistant
- Peer notetaker
- Peer tutor

| status | lastname | fir |
|-------------|-------------|-------|
| Contains: ▾ | Contains: ▾ | Cont |
| Assigned | 1973 | Mike |
| Active | 1995 | Mike |
| Active | Alyssa | Mike |
| | Aulakh | Ralp |
| | Bob | Billy |
| | Bob | Sally |
| | Dinunzio | Alys |
| | Dinunzio | Mike |
| | dinunzio | Ralp |
| Active | Gorilla | Jane |
| | jack | magi |
| | Jones | Alph |
| | Jones | Alph |
| | Jones | Ralp |
| | Jones | Ralp |
| | Jones | Ralp |
| | Jones | Ralp |
| | Jones | Ralp |

Session

Winter Session 2011 ◀ Now ▶ Set as default

Session chooser— determines which session to show data for.

Reports— any reports can be published here using the settings.



Grouping ▾
Layout ▾

181. Peer notetaking - student...
182. Peer notetaking - Notetak...

View Reports

| stname | student_no | specialization | email | phone1 | phone2 | phonenote |
|--------|------------|----------------|---------------------|------------------|------------------|-----------|
| ains: | Contains: | Contains: | Contains: | Contains: | Contains: | Contains: |
| | 1973 | | 1973@tpro.ca | 416 905 8463 | | |
| | 1995 | | 1995@tpro.ca | 416 905 8463 | | |
| | 1999 | | 1999@tpro.ca | 416 905 8463 | | |
| h | research | | research@tpro.ca | 416-805-9630 | 905-846-9630 | |
| | 1923485 | | mike@tpro.ca | | | |
| | 23423449 | abcfff | sally@tpro.ca | ddd 555 | eee 444 | |
| saa | alyssa | | alyssa@tpro.ca | 416-848-7365 | 416-805-9630 | |
| | 9944114 | a | 9944114@tpro.ca | | y | |
| h | 1973T | | ralph@tpro.ca | 416-805-9630x | 905-846-9630y | |
| | 123444332 | | 77777@tpro.ca | 416-848-0520 | 416-805-9630 | |
| ic | magic | | | | | |
| aMike8 | michael | | michael@tpro.ca | 416-805-9630 | 905-846-9630 | |
| Mike3 | michael | | sadfsadfasdf | 416-805-9630 | 905-846-9630 | |
| h | support | 1asdfsadfsdf | support@tpro.caasdf | 416-805-9630sadf | 905-846-9630sadf | |
| h | asdfsadf | | asdfsadf@tpro.ca | 416-805-9630 | 905-846-9630 | |
| h | 33eee | | 33eee@tpro.ca | 416-805-9630 | 905-846-9630 | |
| h | 334455 | | 334455@tpro.ca | 416-805-9630 | 905-846-9630 | |
| h | happy | | ralph@tpro.ca | 416-805-9630 | 905-846-9630 | |

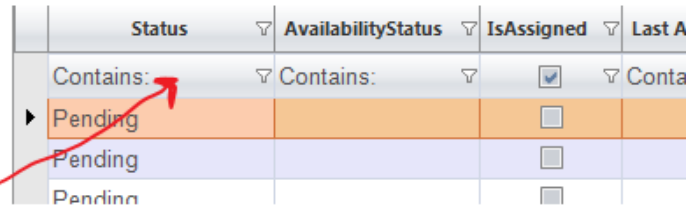
Service Providers Management

Service Providers Tab

Use filtering, sorting and grouping

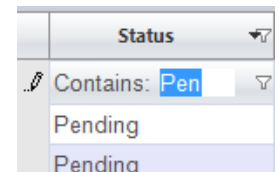
FILTERING

1. Using the mouse click once in the filter area of the column you wish to filter by



| Status | AvailabilityStatus | IsAssigned | Last A |
|-----------|--------------------|-------------------------------------|--------|
| Contains: | Contains: | <input checked="" type="checkbox"/> | Conta |
| Pending | | <input type="checkbox"/> | |
| Pending | | <input type="checkbox"/> | |
| Pending | | <input type="checkbox"/> | |

2. Type in the text you wish to filter by. The text you type will match any part of items in the column.



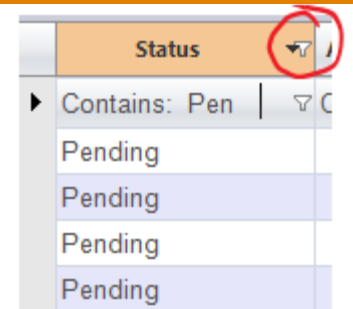
| Status |
|---------------|
| Contains: Pen |
| Pending |
| PENDING |

SORTING

1. Using the mouse click once on the column you wish to sort by

2. Click a second time to toggle sorting ascending or descending

3. Hold the <SHIFT> key on your keyboard while clicking once on a second column to sort by multiple columns



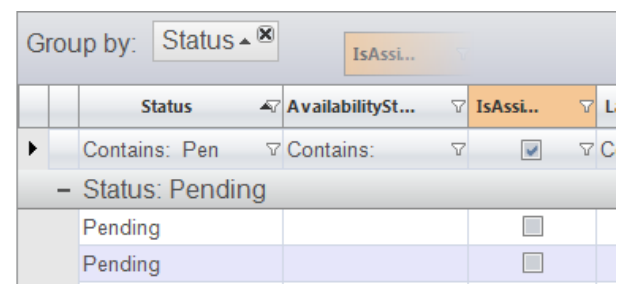
| Status |
|---------------|
| Contains: Pen |
| Pending |
| Pending |
| Pending |
| Pending |

GROUPING

1. Using the mouse drag the column header you wish to group to the top entitled "Drag a column here..."

2. Click the "X" button on the column name in the grouping area at the top to remove the grouping

3. Optionally drag a second column header to group by multiple columns



| Status | AvailabilitySt... | IsAssi... | L |
|-------------------|-------------------|-------------------------------------|---|
| Contains: Pen | Contains: | <input checked="" type="checkbox"/> | C |
| - Status: Pending | | | |
| Pending | | <input type="checkbox"/> | |
| Pending | | <input type="checkbox"/> | |

Assigning a Service Provider



1. Optionally click the “Check availability” button in the ribbon bar at the top to highlight pending requests that have at least one provider available.
2. Potential providers will be listed in the table at the center of the popup box. Optionally click one of the “Show all providers” buttons to see providers ClockWork has not automatically matched up.
3. Optionally right-click on a provider in the list and choose “View provider profile” to access the intake form for that provider
4. Note the “Assigned count” column, which will indicate if this provider has been assigned to other students already.
5. Right-click on a providers name and choose “Assign provider”

| Available Service Providers: | | | | | | | | | | Show potential providers by availability | Show all providers |
|------------------------------|-------------|-------------|-------------|----------------|---------------|--------------|--------------|----------------|-------------|--|--------------------|
| status | lastname | firstname | id number | assigned_count | email | phone1 | phone2 | subject | course | | |
| Contains: ▾ | Contains: ▾ | Contains: ▾ | Contains: ▾ | Equal: ▾ | Contains: ▾ | Contains: ▾ | Contains: ▾ | Contains: ▾ | Contains: ▾ | Contains: ▾ | |
| | Bob | Billy | 1923485 | 2 | mike@tpro.ca | | | Basket Weaving | 101 | | |
| | Jones | Ralph | 1973x | 0 | ralph@tpro.ca | 416-805-9630 | 905-846-9630 | Basket Weaving | 101 | | |
| | Notetaker | Fake | fake | 1 | | | | Basket Weaving | 101 | | |

Cancelling a Service Provider

1. Double-click the request you wish to cancel the provider for
2. Right-click the assigned provider and choose “Cancel provider”

Emailing

EMAILING STUDENTS

1. Click the “Requests” tab
2. Select the request(s) you would like to send an email for. Use the <SHIFT> and <CTRL> keys on your keyboard to select multiple rows.
3. Click the “Email” button in the ribbon bar at the top
4. Select the email template you would like to use



EMAILING PROVIDERS

1. You can send emails to providers by using the method outlined above in “Emailing students”. The mail merge template you create should use the providers email address in the “To” field instead of the students.
2. To send emails to providers directly, click the “Requests” tab
3. Select the provider(s) you would like to send an email for. Use the <SHIFT> and <CTRL> keys on your keyboard to select multiple rows.
4. Click the “Email” button in the ribbon bar at the top
5. Select the email template you would like to use

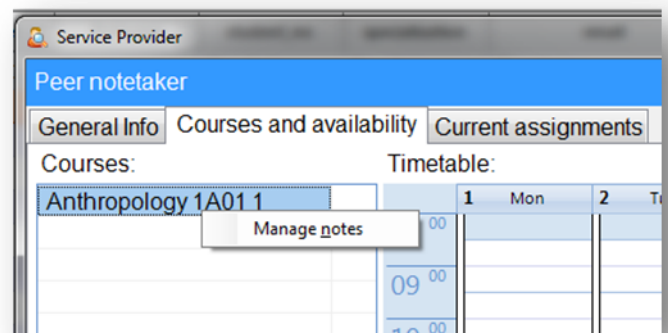


Upload / Download Notes

By provider

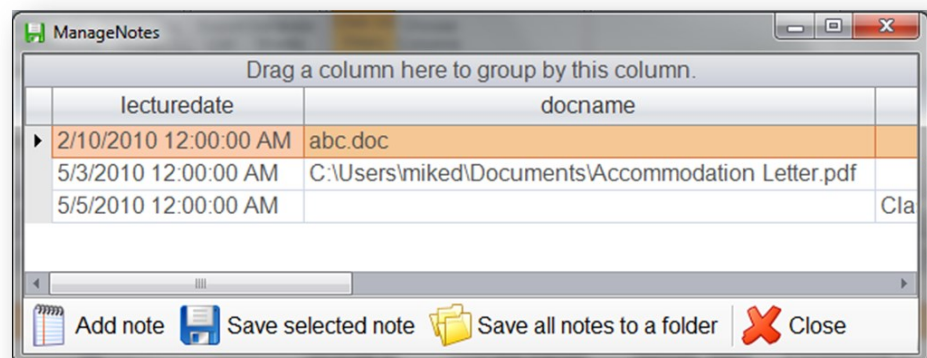
Notes files are electronic files that a notetaker uploads using the ClockWork notetaker web module. Authorized staff are able to view and upload notes on behalf of the notetaker through the ClockWork staff interface.

1. Click the “Service Providers” tab in the management interface
2. Click the appropriate service type on the left
3. Double-click the provider you would like to manage notes for
4. Click the “Courses and availability” tab, and right-click on the course you would like to manage notes for



By request

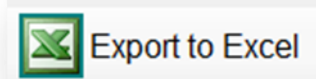
1. Click the “Requests” tab
2. Right-click on the request you would like to manage notes for and click “Manage notes”



Exporting to Excel

You can export all or part of the requests listing to Excel.

1. Highlight the rows you would like to export using <SHIFT> or <CTRL> on your keyboard to select multiple rows. Optionally click <CTRL>+A to select all rows.
2. Click the “Export to Excel” button in the ribbon bar at the top
3. Select the template you would like to use to export the rows. Optionally click the “Export to Excel” button at the bottom of the popup window to export all rows directly to Excel without formatting
4. See the guide at the end of this document for more information on creating Excel templates



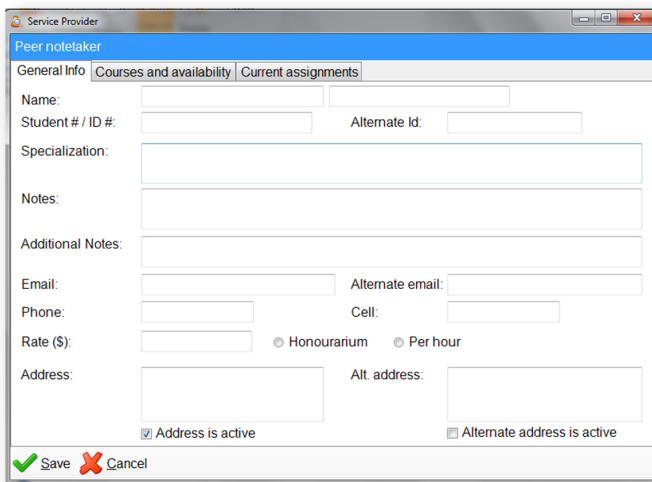
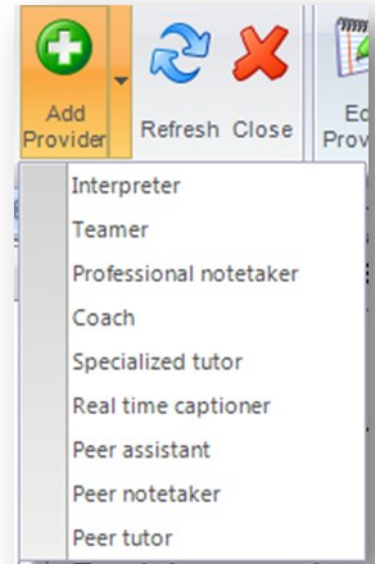
Generating Documents

You can export all or part of the requests listing to documents. This can be used for generating certificates for notetakers, for example.

1. Highlight the rows you would like to export using <SHIFT> or <CTRL> on your keyboard to select multiple rows. Optionally click <CTRL>+A to select all rows.
2. Click the “Generate sheets” button in the ribbon bar at the top
3. Select the template you would like to use to export the rows.
4. See the guide at the end of this document for more information on creating templates

Entering a Provider

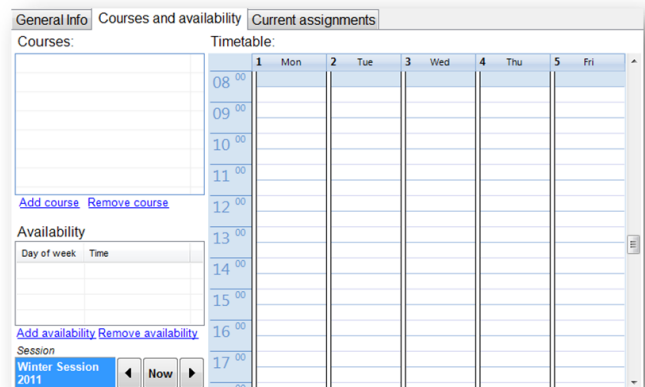
1. Click the “Service Providers” tab
2. Click the “Add Provider” button in the ribbon bar at the top, and select the appropriate service type from the drop-down list.
3. Fill in the contact information for the provider
4. Click the “Courses and availability” tab and fill in the courses and/or availability for the provider. This information will be used to automatically match up providers with students so that suggestions can be provided by the system.



A screenshot of the 'Service Provider' form, 'General Info' tab. The form contains the following fields and options:

- Name: [Text box]
- Student # / ID #: [Text box] Alternate Id: [Text box]
- Specialization: [Text box]
- Notes: [Text box]
- Additional Notes: [Text box]
- Email: [Text box] Alternate email: [Text box]
- Phone: [Text box] Cell: [Text box]
- Rate (\$): [Text box] Honourarium Per hour
- Address: [Text box] Alt. address: [Text box]
- Address is active Alternate address is active

At the bottom, there are 'Save' and 'Cancel' buttons.



A screenshot of the 'Service Provider' form, 'Courses and availability' tab. The form is divided into two main sections:

- Courses:** A table with columns for 'Day of week' and 'Time'. Below the table are links for 'Add course' and 'Remove course'.
- Availability:** A table with columns for 'Day of week' and 'Time'. Below the table are links for 'Add availability' and 'Remove availability'.

At the bottom, there is a 'Session' dropdown menu set to 'Winter Session 2011' and a 'Now' button.

Student Online Notetaking

The online notetaking system consists of two entry points. There is an entry point for students receiving notes and one for students providing notes (notetakers). Potential notetakers can sign up to become a notetaker online. Students login to the notetaking system using their school login and password. Notetakers can upload their notes online and students can download them.

Notetaker Courses

Your courses:

Show term: Winter 2011

[Refresh list](#)

| My courses | I have been selected | My lecture notes |
|---------------|----------------------|--------------------------------------|
| GEOL 322TUT 4 | Yes | Upload lecture notes |
| CLAS 120TUT 1 | No | Upload sample notes |
| ANTH 202LEC 8 | Yes | Upload lecture notes |

Courses

Your courses:

Show term: Winter 2011

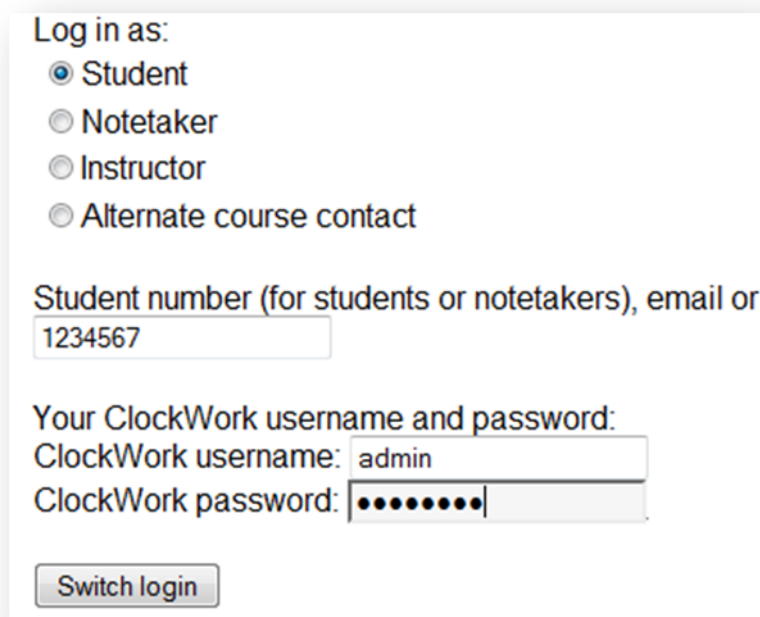
[Refresh list](#)

| My courses | I require a note taker | Note taker availability | My lecture notes |
|---------------|---|-------------------------|------------------|
| CLAS 318LEC 1 | No change this | | N/A |
| Math 310LEC 8 | Notetaking accommodations not approved for this course. If you require a notetaker please contact your disability counsellor. | | |
| ENGL 116LEC 6 | No change this | | N/A |
| ENGL 312LAB 4 | No change this | | N/A |
| BUSI 116LEC 6 | No change this | | N/A |

Logging in as a student

Authorized staff members are able to login to the web system as a student, so they can access the system as the student would. This can be useful for learning the system from the student's perspective, and also for troubleshooting or assisting the student if necessary.

1. Navigate to the staff home page on your ClockWork website.
The url will usually look like the following, where "www.tpro.ca" is replaced by your school's domain name:
<https://www.tpro.ca/clockwork/>
2. Click the "Login as another user" link and login using your ClockWork credentials
3. Click on "Student" or "Notetaker", and enter the student number. Then fill in your ClockWork credentials a second time and click the "Switch login" button.



Log in as:

- Student
- Notetaker
- Instructor
- Alternate course contact

Student number (for students or notetakers), email or

Your ClockWork username and password:

ClockWork username:

ClockWork password:

Configuring Notetaking Web

Accessing the settings

Admin access is necessary for configuring the notetaking settings.

1. Launch the ClockWork Admin
2. Click the “Settings” button on the left
3. Click the “Web Module Settings” on the right
4. Click “Notetaking” on the left
5. Settings are located on the right. Adjust a setting

| Note taking (Note taking group). | |
|--|--------|
| Settings | Values |
| _Main settings | |
| <input checked="" type="checkbox"/> Administrator email | mike@t |
| Equivalent courses stored procedure number | 0 |
| <input checked="" type="checkbox"/> Notetaker approved for all courses accommodation checkbox control id | 1415 |

Resetting the cache

When you change a setting using the steps outlined above, the web system will not update right away. This is because ClockWork utilizes a caching system in order to make the system run more efficiently.

1. Navigate to the cache reset page. This will usually look like the following url, where “www.tpro.ca” will be replaced with your school’s domain name:
<https://www.tpro.ca/clockwork/admin/settings/update.aspx>
2. Enter a ClockWork admin username and password and click the “Update” button to refresh the cache.

Important settings

Administrator Email— email communication will be sent to this address if the system needs to notify you of anything

New notetaker signup email—this email will be sent to all notetakers immediately after they fill out the online intake form

Selected as a notetaker email - this email will be sent to a notetaker the first time they are selected for each course. The email should include your contact information and information about next steps if applicable.

Confidentiality agreement text—All new notetakers will have to agree to the confidentiality agreement as part of the intake process. The wording should reflect appropriate wording for your school.

Report to use to retrieve notetaker course registrations from DataSync and Report to use to retrieve notetaker data from Data Sync—these should point to the reports that handle data sync. Notetaker information and course registrations are pulled in from the data sync system when they sign up online. This is mandatory in order for the system to function properly.

Notetaker Welcome Message—the welcome page wording

Allow students to choose their own notetaker

Welcome message for students—the welcome page wording

Students faq

ClockWork Support

<https://support.tpro.ca>

416-848-0520

clockworksupport@tpro.ca



TECHNO PRO COMPUTER SOLUTIONS INC
170, Traders Boulevard | Mississauga | ON L4Z 1N7 | CANADA

Phone: 1 866 680 2491 | Fax: 1 866 344 1440