

# CLOCKWORK

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## Training Manual and Reference: Workshops

# CLOCKWORK TRAINING WORKSHOPS

## LEARNING OBJECTIVES

Become familiar with the Workshops Interface

Create a workshop group

Create a workshop event

Create an appointment

Add attendees

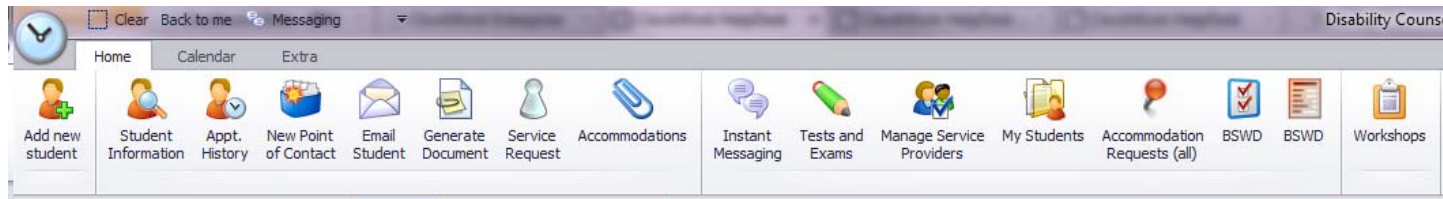
Add facilitators

Create a recurring workshop appointment

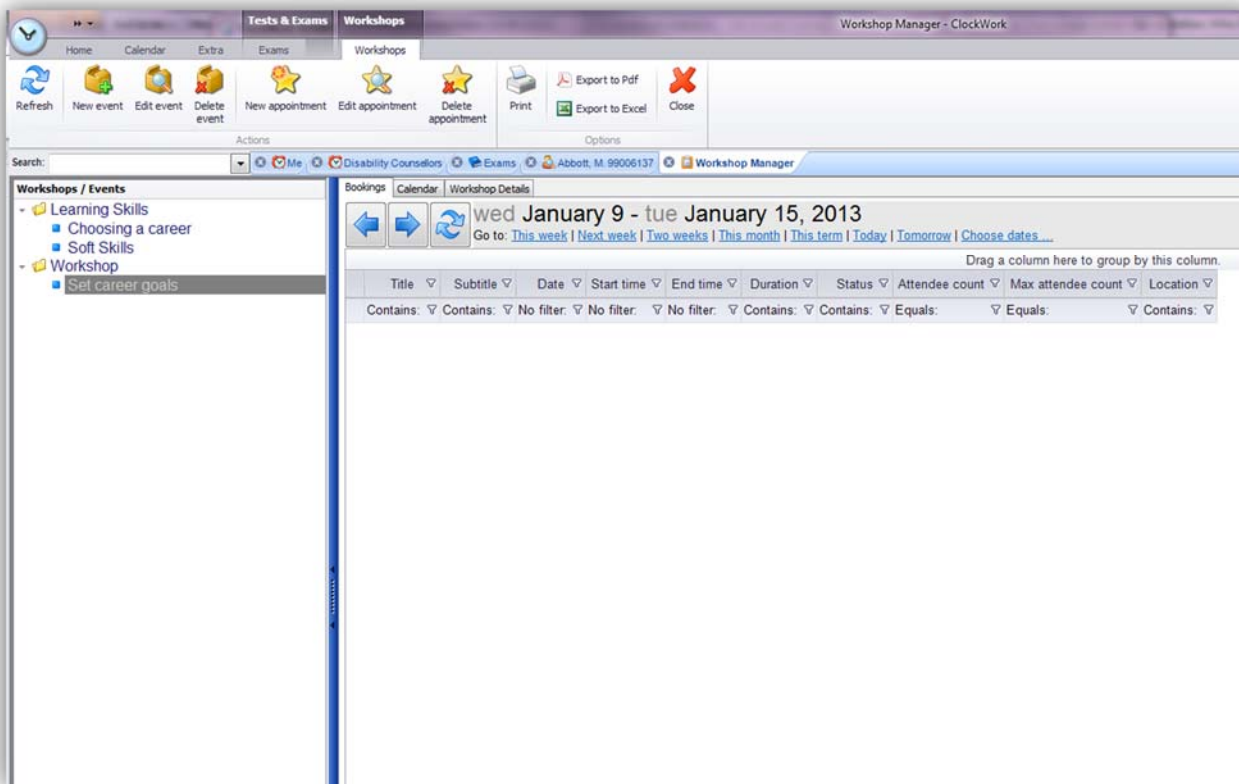
Export to pdf/excel

Book a workshop online- student

Workshops - Admin



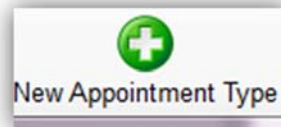
To access workshops from Clockwork, Click on the Workshops button on the Clockwork Ribbon bar.



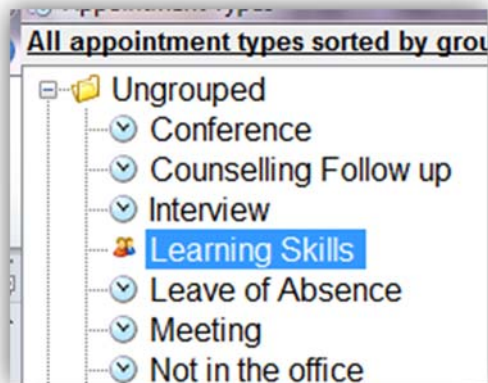
This is the screen that opens up where you can manage your workshops

## Creating a workshop group

- Login to clockwork admin
- Select Appointments -> Appointment Types

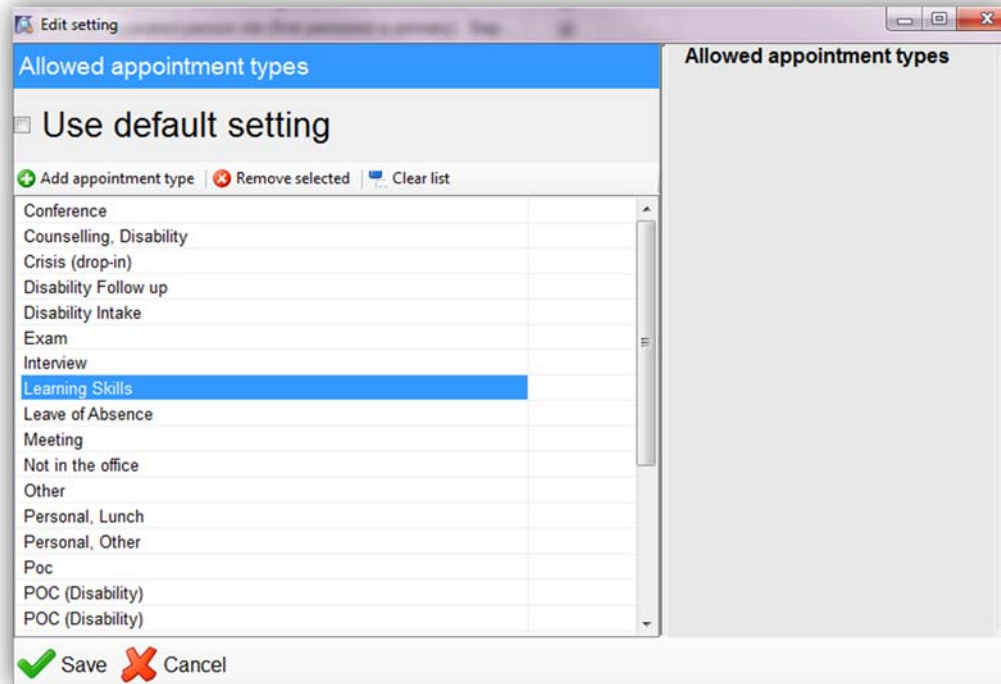
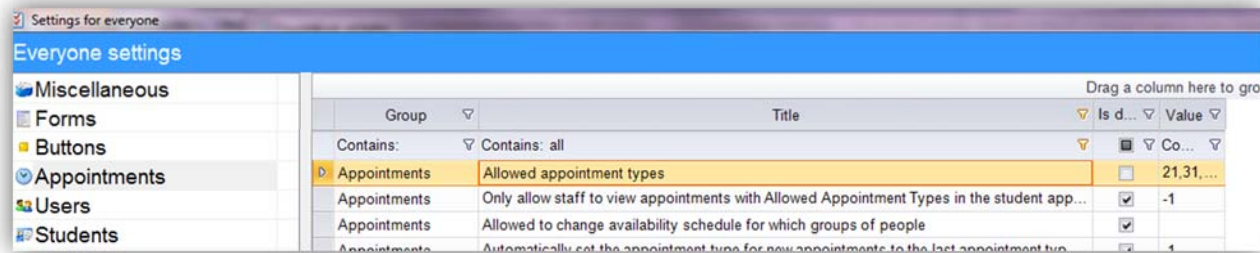


- Click on New Appointment Type
- Enter the Workshop title in the appointment title section and check the workshop check box.
- Click on 'Ok' to save the workshop group.

A screenshot of a dialog box titled "Appointment Type Details". The "Group" dropdown is set to "Ungrouped". The "Appointment Title" field contains "Learning Skills". There are buttons for "Colour; Click to change", "Random", "Auto icon:", and "Clear". The "Workshop" checkbox is checked, and the "Test / Exam" checkbox is unchecked. A checkbox for "This appointment should appear in Today's Highlights." is also unchecked. Below this is a section for "Associated assessment / notes form(s)" with a table. The table has two columns: "Item" and an empty column. The items listed are: Doctor's Actions, Notes (D), Nurse Actions, Online booking form, Session Notes (Aboriginal), Session Notes (Academic), Session Notes (Career), Session Notes (Counselling), Session Notes (Equity), and Session Notes (HS). The "Active" checkbox is checked. At the bottom, there are "OK" and "Cancel" buttons with green and red checkmarks respectively.

- In certain cases you need to allow the workshop appointment types in order for it show up in Clockwork

Login to Clockwork admin->settings-> Clockwork main settings->Appointments ->Allowed Appointment Types



## Creating a workshop event

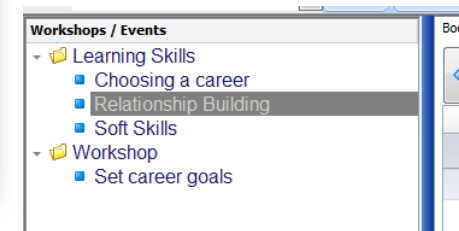
- Click on the New event button available on the ribbon bar.
- Select the workshop group from the drop down menu and enter the workshop details and click 'Save'. This is used to refer the details of the workshop whenever you want to schedule a date for the workshop

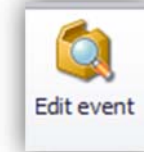


The dialog box titled "New workshop event" contains the following fields:

- Workshop Group:** A dropdown menu with "Learning Skills" selected.
- Facilitator 1:** A dropdown menu with "Disability, Manager . MDISABILITY" selected.
- Workshop Title:** A text box containing "Relationship Building".
- Facilitator 2:** A dropdown menu with "Jack Ryans" selected.
- Workshop Description:** A text area containing "To learn how to maintain and build new relationships".
- Facilitator 3:** A dropdown menu with "Michelle Adams" selected.
- Workshop Location:** A text box containing "Gray Hall".
- Workshop Notes:** A text area containing "Faciliator should be present one hour early".
- Maximum Attendees:** A spinner box set to "15".
- Workshop Fee:** A spinner box set to "\$ 10.00".

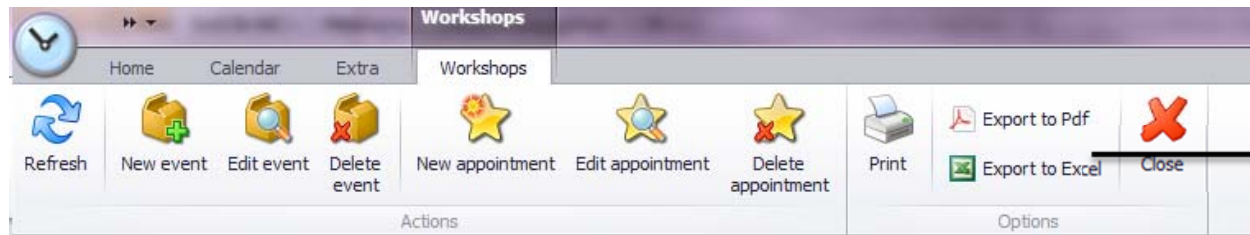
At the bottom, there are two buttons: a green checkmark icon labeled "Save" and a red X icon labeled "Close".





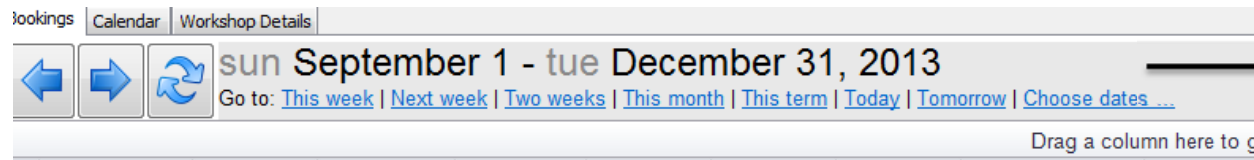
- You can click on edit event button on the ribbon bar to edit the event details anytime.
- If you have to delete an event, you can hit the delete event button on the ribbon bar. You can only delete an even it is empty.

**Export to pdf/excel**



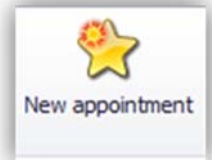
Export the list of workshop appointment in to excel or pdf

**Filter by date range**



Use the different links to filter by week, term etc. Click on choose dates to pick your own dates

## Create a workshop appointment



- To create an appointment for a workshop event. Click on new appointment or select the event and right click to book a new appointment.

Use this section to enter the date and time of the appointment. Use the duration field to set the duration which can help you determine the end time of the appointment type.

Use the 'type' drop down menu to select the workshop group. And the 'workshop' dropdown menu to select the workshop event

Enter the total number of attendees that are allowed to attend this workshop.

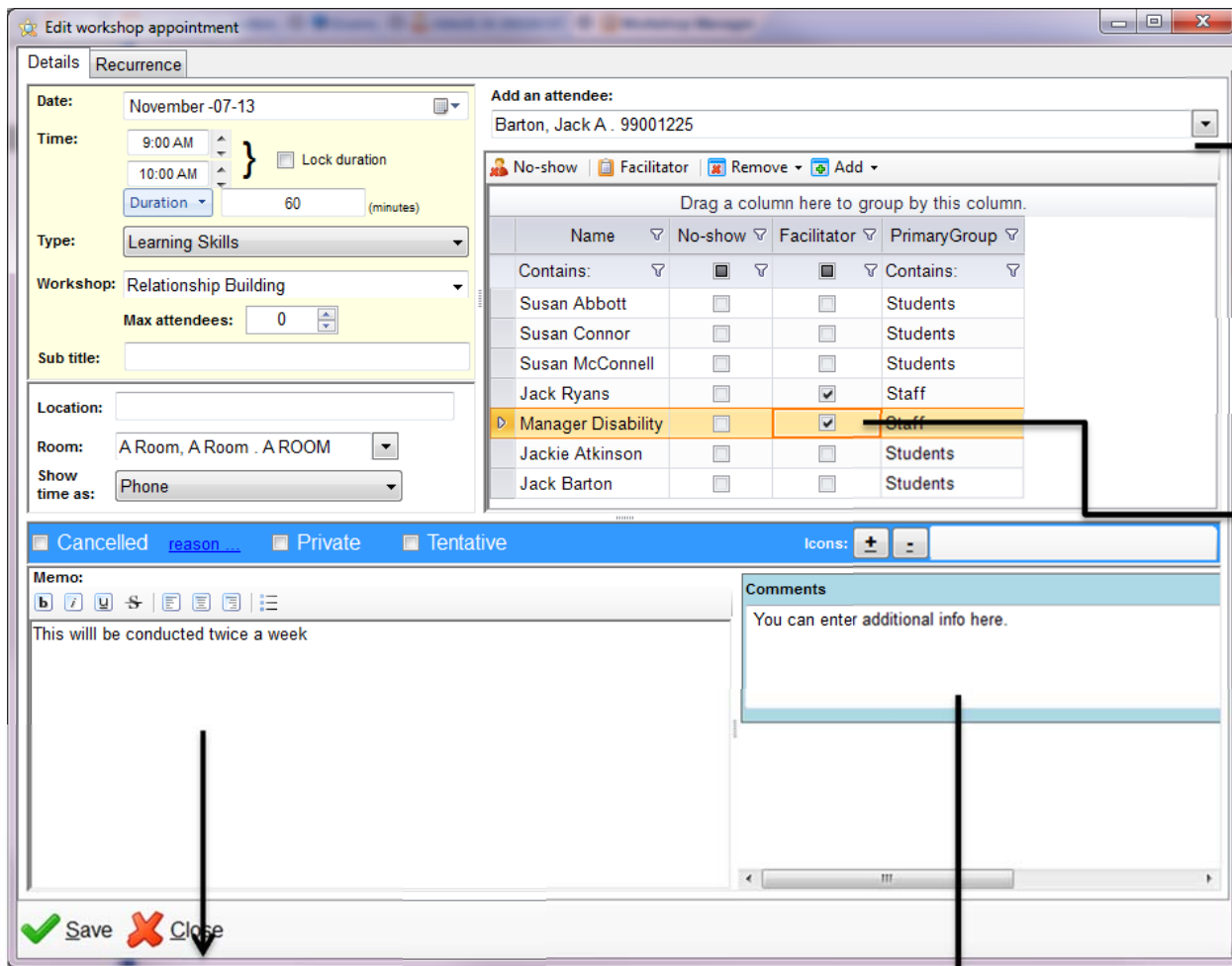
The screenshot shows the 'New workshop appointment' dialog box with the following details:

- Date:** November -07-13
- Time:** 9:00 AM to 10:00 AM
- Duration:** 60 (minutes)
- Type:** Learning Skills
- Workshop:** Relationship Building
- Max attendees:** 0
- Sub title:** (empty)
- Location:** (empty)
- Room:** (empty)
- Show time as:** (empty)

The 'Add an attendee' section contains a table with columns: Name, No-show, Facilitator, PrimaryGroup, and Contains. The table is currently empty.

At the bottom, there are 'Memo' and 'Comments' sections, and 'Save' and 'Close' buttons.





You can add both students and attendee by searching for them by their name or student number

In this section you can select and add an attendee one at a time. You can select some of the attendees as Facilitators. You can alternatively mark an attendee as no-show.

This section can used to type any kind of notes specific to this appointment

Here is where you can have a dynamic form attached to your workshop appointment to capture additional information on every workshop appointment.

## Booking a recurring workshop appointment (Simple)

- To book a recurring appointment select the check box 'this appointment is recurring'.
- Enter the time range to add.
- You can select the duration button to determine the end time of the appointment.
- Use the date picker field to add the dates to the list. Just double click on the dates. Then click on 'Save'.

**New workshop appointment**

Details Recurrence

This appointment is recurring

Simple Advanced

Time range to add:

9:00 AM } Lock duration  
10:00 AM }

Duration 60 (minutes)

Double-click a date to add it

November 2013

Date	Duration	New instance
Nov 14, 2013 . 9:00 AM	1 hour	<input checked="" type="checkbox"/>
Nov 21, 2013 . 9:00 AM	1 hour	<input checked="" type="checkbox"/>
Nov 11, 2013 . 9:00 AM	1 hour	<input checked="" type="checkbox"/>
Nov 28, 2013 . 9:00 AM	1 hour	<input checked="" type="checkbox"/>
Nov 29, 2013 . 9:00 AM	1 hour	<input checked="" type="checkbox"/>

Save Close

Enter the start time and end time of the recurring appointments

Double click on a date to add it to the list on the right. Here you can switch to different months or years.

Here you will see the list of dates that are added when you select them on the date picker. You can clear the list to start adding the dates again.

## Booking a recurring workshop appointment (Advanced)

- Select the 'Advanced' tab when you are in the recurring appointment section.
- Select the time range to add
- Select the recurrence pattern and then 'Save'.

Enter the start time and end time of the recurring appointments

Select the recurrence pattern by day, week, month or year. For example: Here we have the pattern selected as weekly and the range of recurrence was set to start on Nov 8th 2013 and ends after 8 occurrences

**Time range to add:**  
12:00 AM } Lock duration  
12:00 AM }  
Duration: 0 (minutes)

**Recurrence pattern:**  
 Daily  Every: 1 day(s)  
 Weekly  Every weekday  
 Monthly  
 Yearly

**Range of recurrence:**  
Start: November 8, 2013  
 End after: 8 occurrences  
 End by: December 31, 2013

**Recurring dates for this appointment set:**  
Clear list

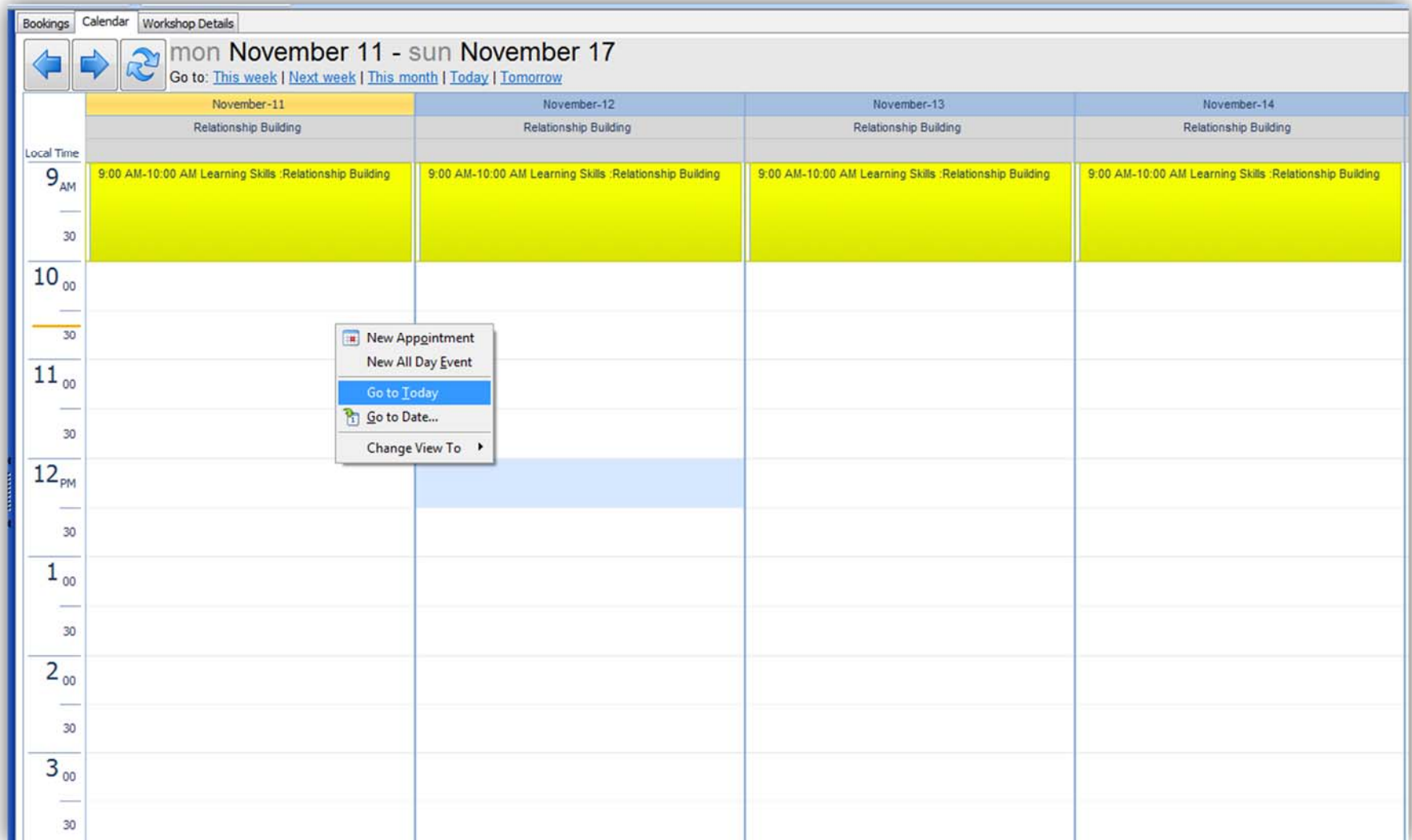
Date	Duration	New instance
Nov 8, 2013 . 12:00 AM		<input checked="" type="checkbox"/>
Nov 15, 2013 . 12:00 AM		<input checked="" type="checkbox"/>
Nov 22, 2013 . 12:00 AM		<input checked="" type="checkbox"/>
Nov 29, 2013 . 12:00 AM		<input checked="" type="checkbox"/>
Dec 6, 2013 . 12:00 AM		<input checked="" type="checkbox"/>
Dec 13, 2013 . 12:00 AM		<input checked="" type="checkbox"/>
Dec 20, 2013 . 12:00 AM		<input checked="" type="checkbox"/>
Dec 27, 2013 . 12:00 AM		<input checked="" type="checkbox"/>

Save Close

Once you click on the button 'Add this recurrence pattern to the list'. The list of dates is added here.

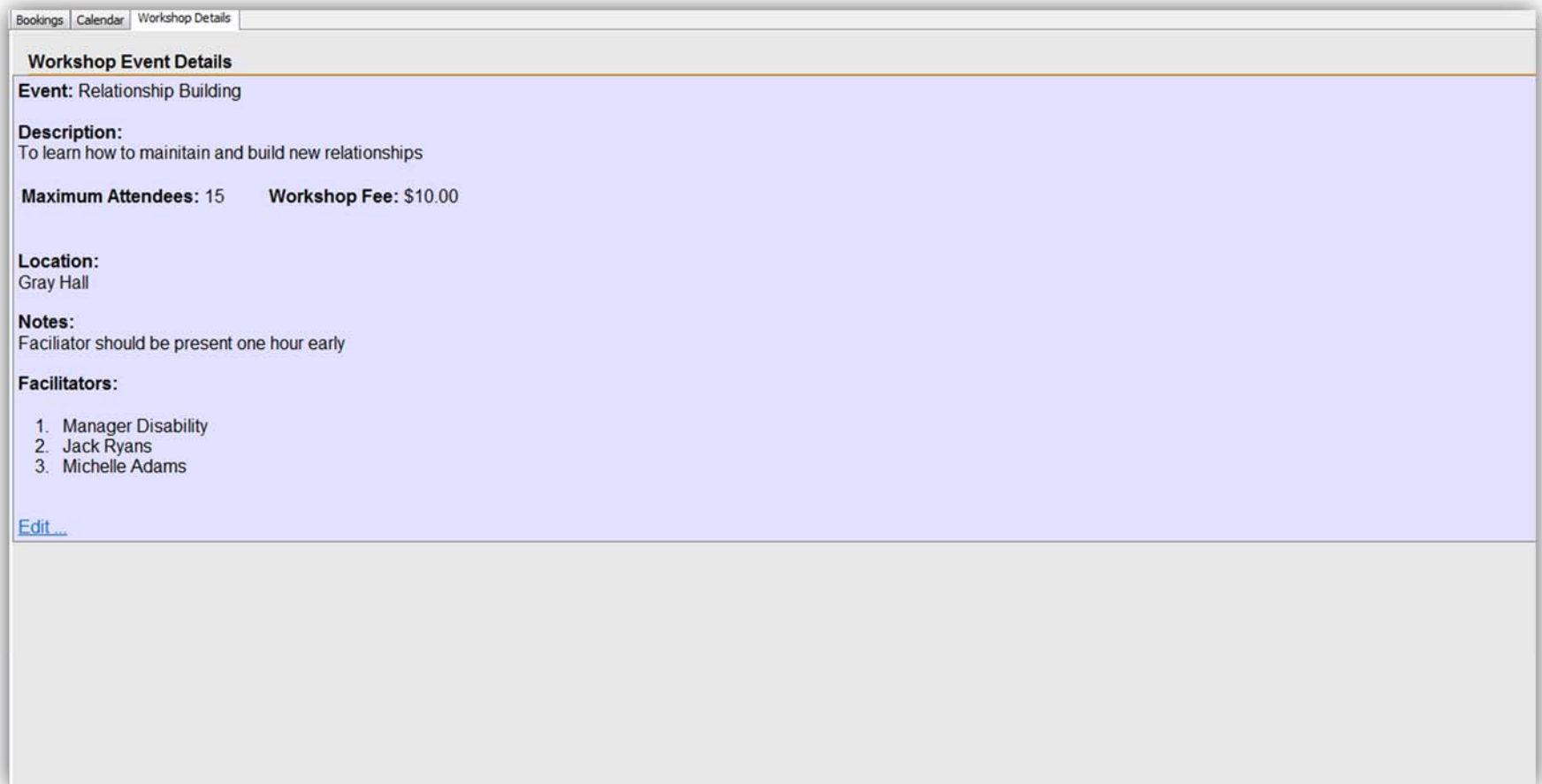
## Graphical Calendar

The graphical calendar of the workshop enables you to see the list of workshops in a graphical view. You can right click on the calendar to book an appointment, go to a specific date or change view to day/week or month.



## Workshop Event Details

The workshop event detail shows you the description and other info of the workshop event that was created initially by you. You can edit this information anytime. The description entered here is seen on the web by the students.

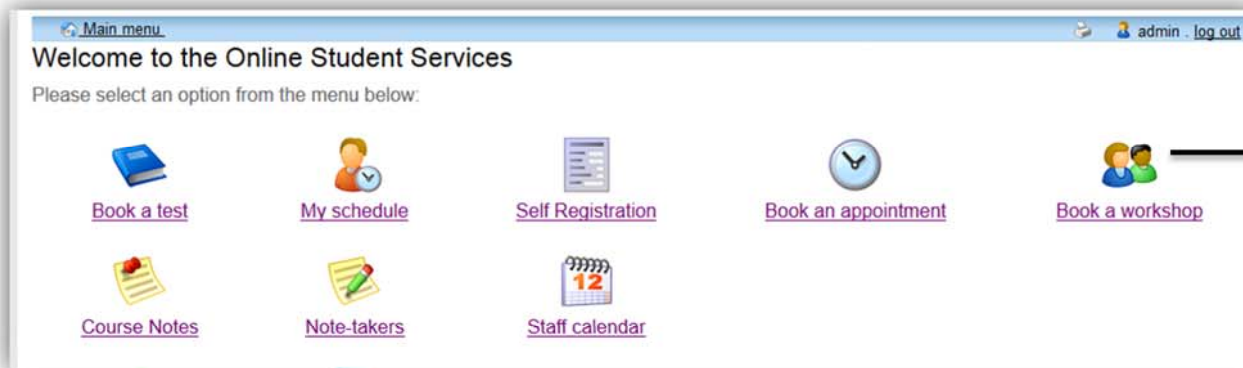


The screenshot shows a web interface with a navigation bar at the top containing 'Bookings', 'Calendar', and 'Workshop Details'. Below the navigation bar is a header section titled 'Workshop Event Details'. The main content area is light blue and contains the following information:


- Event:** Relationship Building
- Description:** To learn how to maintain and build new relationships
- Maximum Attendees:** 15      **Workshop Fee:** \$10.00
- Location:** Gray Hall
- Notes:** Faciliator should be present one hour early
- Facilitators:**
  1. Manager Disability
  2. Jack Ryans
  3. Michelle Adams

At the bottom left of the main content area, there is a blue link labeled 'Edit...'. Below the main content area is a light gray footer section.

## Online workshop booking



The student can choose the book a workshop button to register with any of the workshops published online. They will be prompted to login using their school login credentials.



[Main menu](#) admin [log out](#)

Information  
Available workshops  
My upcoming appts  
Logout

## Workshop / Event Booking


Welcome to the Workshop / Event Booking website. You can use this website to:

- View a list of workshops/events that we offer
- Sign-up for a workshop or event
- Check your upcoming scheduled appointments

Please click the [Available workshops](#) link in the menu to the left in order to get started. You will be asked to login using your school login account when you are ready to book a workshop.

ClockWork Online Student Access

This welcome page text can be edited through clockwork admin.



[Skip to main content](#) [Main menu](#) admin [log out](#)

Information  
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Logout


## Book a Workshop

Available events are listed below. Click on the 'Book' button beside the event you would like to signup for.

Date	Time	Available spaces	Action
<b>Choosing a Major;</b> Having difficulty in deciding on a major? This workshop will provide tips on narrowing down your selection and making sure you know all of your options.			
Thursday February 28	9:00 AM to 10:00 AM 1 hour	7	<a href="#">Book</a>
<b>Life after Grad School;</b> Workshop description 123 ...			
Monday February 18	9:00 AM to 10:00 AM 1 hour	5	<a href="#">Book</a>
<b>Social Anxiety / Shyness Workshop;</b> A group to help student increase strategies to increase social comfort and relationships.			
Monday February 25	12:00 AM to 12:00 AM 0 minutes		
<b>Wellness Workshops;</b> Students are invited to enhance their personal wellness by participating in this series. All workshops are designed and facilitated by Wellness Centre staff.			
Tuesday February 19	9:00 AM to 10:00 AM 1 hour	20	<a href="#">Book</a>

ClockWork Online Student Access

The students can see the list of the date and times of all the workshops that are coming up. They can click on 'book' in order to register for a specific workshop.



[Main menu](#) admin . [log out](#)

Information


Available workshops

**My upcoming appts**


Logout

### My upcoming events

Your event listing

Details	Date / time	Status	Options
<b>Exam</b> GEOG 1455 008	<b>Wed. November 13</b> 9:00 AM to 12:55 PM	Booked	<input type="button" value="Cancel"/>
 <b>Learning Skills</b>	<b>Wed. November 13</b> 9:00 AM to 10:00 AM	Booked	<input type="button" value="Cancel"/>
<b>Counselling, Disability</b> Manager	<b>Wed. December 4</b> 11:00 AM to 12:00 PM	Booked	<input type="button" value="Cancel"/>

ClockWork Online Student Access



[Main menu](#) admin . [log out](#)

Information

Available workshops

**My upcoming appts**

Logout

### Sign-up for a workshop

#### Relationship Building

To learn how to maintain and build new relationships

Wednesday November 13  
**9:00 AM to 10:00 AM**

ClockWork Online Student Access

The students can see their upcoming workshops under the my upcoming appts menu





## Workshops admin

- Login to clockwork admin->settings->web module settings-> and select workshops
- You can double click on the display menu settings and edit the text that is displayed on the web.
- Click on email to edit the email that goes out to the student as soon as they book a workshop online.

Settings	Values	Is Default value?
<b>_Main settings</b>		
✓ Workshops to publish	18	No
<b>Display</b>		
Welcome page info	Browsable content	Yes
Workshop listing page instructions	Available events are listed below. Click on the 'B...	Yes
<b>Email</b>		
Student confirmation of booking email	<email> <to>#-email-#</to> <from>#-from-#...	Yes
<b>Rules</b>		
Allow non-ClockWork students to a...	False	Yes
Apply form number		Yes
Facilitator workshop form number		Yes
Form for collecting info from user d...		Yes
New user registration form.		Yes
Post booking form number		Yes

- Select the 'workshops to publish' setting to select the workshop you want to publish online for students.

