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Approving a Fixed Hours timesheet with no changes to original booking hours

Introduction and Description

A Department Manager wants to approve a Fixed Hours timesheet which had no changes made by the worker, (Walter Strike) who completed the booking for the Lecture from the Scenario 1 - Direct Booking Fixed Hours example below.

*The Department Coordinator wants to create a booking for a Lecturer Payrate £80.05 on Tuesday from 09.00 - 13.00 for one week only.*

*This Lecturer Payrate £80.05 has already agreed to the booking with the course organiser, so the Department Coordinator only wants to send it to one worker.*
Step 1
Sign into the UAT Dashboard using your Department Manager account.
https://cambridgetest.demodashboardtechnology.co.uk
Step 2
Select the **Timesheets** button.
Step 3

The Manage Timesheets page will display all the timesheets you are managing. The Status column will indicate which timesheets are ready to approve (highlighted in yellow) and which ones are still with the worker (highlighted in cyan) for them to submit.

Any timesheet highlighted in red with a red dotted line indicates the worker has amended their timesheet, for example they have changed the hours they worked.
Step 4

To approve a timesheet, select the To Approve button from the left-hand panel.

The screen will refresh and will display the Manage Timesheets page. Locate the relevant timesheet from the list. In this case it’s the Lecturer Booking from Walter Strike.
Step 5

Tick the box at the far left-hand end of the timesheet and press the green **approve** button.

**Note!** If you are in the position to approve all timesheets in one go, you can tick the box at the top of the far left-hand column, titled **Select All On Page**.

<table>
<thead>
<tr>
<th>Select All On Page</th>
<th>Worker</th>
<th>Ref</th>
<th>Authorised</th>
<th>Booking Title</th>
<th>Booking Type</th>
<th>Location</th>
<th>Date</th>
<th>Pay Rate</th>
<th>Total Pay</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Will Bevan</td>
<td>209103</td>
<td></td>
<td>Demonstrator Booking</td>
<td>First-accept, First-book</td>
<td>Department of Veterinary Medicine</td>
<td>10/06/2022 13:00 - 19:00</td>
<td>£13.81</td>
<td>£91.58</td>
<td>(1)</td>
</tr>
<tr>
<td></td>
<td>Walter Strike</td>
<td>209031</td>
<td></td>
<td>Examiner Booking</td>
<td>Direct Booking</td>
<td>Department of Veterinary Medicine</td>
<td></td>
<td>£22.10</td>
<td>£316.24</td>
<td>(1)</td>
</tr>
<tr>
<td></td>
<td>Walter Strike</td>
<td>209029</td>
<td></td>
<td>Lecturer Booking</td>
<td>Direct Booking</td>
<td>Department of Veterinary Medicine</td>
<td>24/05/2022 09:00 - 13:00</td>
<td>£80.05</td>
<td>£360.39</td>
<td>(0)</td>
</tr>
</tbody>
</table>

Press **OK** again.

**Please Confirm**

Are you sure you want to approve the selected timesheets? (Please note: When selecting multiple timesheets you may be approving timesheets with zero hours.)

[Ok] [Cancel]
Step 6

The page will refresh displaying a yellow message at the top stating that ‘The selected items have been updated’. All remaining timesheets yet to be approved will be displayed in the list.
Step 7
To view all approved timesheets, select the Approved button from the left-hand panel.

All approved timesheets will be displayed.

Finish
Approving a Fixed Hours timesheet with changes to the hours worked

Introduction and Description

A Department Manager agrees that an extra hour was worked and wants to approve a Fixed Hours timesheet which had one extra hour added by the worker, (Wilma May), who completed the booking for Front of House Support, from the Scenario 3 – Post Job with Fixed Hours example below.

*The Department Coordinator wants to create a booking for a Front of House Support, Payrate £10.00 (hourly rate), Thursday from 14.00 - 22.00. A total of 8 hours.*

*The Department Coordinator has a number of workers registered who they want to advertise the role to and then select from the pool of workers who have registered their interest in the job.*
Step 1
Sign into the UAT Dashboard using your Department Manager account.
https://cambridge-test.demodashboardeotechnology.co.uk
Step 2

Select the Timesheets button.
Step 3

The Manage Timesheets page will display all the timesheets you are managing.

The Status column will indicate which timesheets are ready to approve (highlighted in yellow) and which ones are still with the worker (highlighted in cyan) for them to submit.

Any timesheet highlighted in red with a red dotted line, indicates the worker has amended their timesheet, for example they have changed the hours they worked. The system will highlight this as seen below, the finish time of 23:00 is marked in red with an exclamation mark next to it.
Step 4
To approve a timesheet, select the To Approve button from the left-hand panel.

The screen will refresh and will display the Manage Timesheets page. In this case it shows just the one timesheet, the Front of House Support Booking Timesheet from Wilma May.
Step 5

If a Department Manager wishes to, they can select the **Audit** button and view the Audit Trail of the timesheet.

The Description column shows greater detail of the submitted hours worked and breaks taken.
Step 6

Selecting the **Edit** button allows the Department Manager to edit the timesheet.

From here they can change the Finance Code used to pay the worker by clicking in the cost code field, as well as adding an additional cost code by selecting the green **Add Cost Code** button. Finally selecting the **Update Finance Codes** button will update any changes made.
The Department Manager can also view the remaining hours available for the worker, update the hours worked and the unpaid breaks taken, using the fields at the bottom of the Edit Timesheet panel, as shown below:
Step 7
To approve a timesheet, navigate to the **To Approve** Manage Timesheet page and tick the box at the left-hand end of the timesheet you want to approve. Finally press the green **Approve** button.

Press **OK** again.

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**Please Confirm**

Are you sure you want to approve the selected timesheets? (Please note: When selecting multiple timesheets you may be approving timesheets with zero hours.)

- **Ok**
- **Cancel**
Step 8
The page will refresh displaying a yellow message at the top stating that ‘The selected items have been updated’.

Manage Timesheets
Step 9
To view all approved timesheets, select the Approved button from the left-hand panel.

All approved timesheets will be displayed.
Step 10

Selecting the **Timesheets** button from the left-hand menu will also show all timesheets including their status. Below we can see the timesheet we have approved for Wilma May.

![Timesheets button and timesheet screenshot]

Finish
Disputing a Fixed Hours timesheet with changes to the hours worked

Introduction and Description

The Department Manager does not agree that the Front of House Support worker worked an extra hour and wants to dispute the Fixed Hours timesheet which had one extra hour added to the timesheet by the worker, (Wilma May), who completed the booking for Front of House Support, from the Scenario 3 – Post Job with Fixed Hours example below.

*The Department Coordinator wants to create a booking for a Front of House Support, Payrate £10.00 (hourly rate), Thursday from 14.00 - 22.00. A total of 8 hours.*

*The Department Coordinator has a number of workers registered who they want to advertise the role to and then select from the pool of workers who have registered their interest in the job.*
Step 1
Sign into the UAT Dashboard using your Department Manager account.
https://cambridgetest.demodashboardechnology.co.uk
Step 2
Select the **Timesheets** button.
Step 3

The Manage Timesheets page will display all the timesheets you are managing.

The Status column will indicate which timesheets are ready to approve (highlighted in yellow) and which ones are still with the worker for them to submit (highlighted in cyan), plus timesheets you have approved (highlighted in green).

Any timesheet highlighted in red with a red dotted line, indicates the worker has amended their timesheet, for example they have changed the hours they worked. The system will highlight this as seen below. Wilma May has extended her finish time by 1 hour to 23:00 and this is marked in red with an exclamation mark next to it.
Step 4

In this case the Department Manager needs to dispute this as the extra time was not agreed in advance. There are a couple of options open to the Department Manager to enable them to proceed with this. Option 1 is to add a note to the worker which the worker will see. Option 2 is to edit the timesheet.

**Option 1**

To add a note, select the **notes** button at the right-hand end of the timesheet.

The screen will refresh with a yellow message at the top of the page. Select the **Click here** link to add a note.
The **Create a new Note** page will appear.

Enter a **Title** plus your **Note** and press the cyan coloured **Create** button as shown below:

The screen will refresh with a yellow message at the top of the page stating the ‘Note has been successfully created’, as shown below.
The worker will have an indication that a note has been left for them on their Manage Timesheets page, as shown below:

<table>
<thead>
<tr>
<th>Ref</th>
<th>Booking Title</th>
<th>Booking Type</th>
<th>Department</th>
<th>Location</th>
<th>Job Title</th>
<th>Date</th>
<th>Total Time</th>
<th>Total Pay (£)</th>
<th>Status</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>209114</td>
<td>Front of House Support</td>
<td>Post Job</td>
<td>Education Services</td>
<td>Student Services Centre</td>
<td>Cambassador (CLW)</td>
<td>20/06/2022 14:00 - 23:00</td>
<td>08:30</td>
<td>£95.67</td>
<td>Submitted</td>
<td>notes (1)</td>
</tr>
</tbody>
</table>

**Step 5**
Best practice should be for the Manager to contact the worker outside of Dashboard too, so that they can reach an agreement.

**Step 6**
**Option 2**
The other option open to the Department Manager is to ‘dispute’ the timesheet. To do this, the Department Manager edits the timesheet and changes the relevant details. Once changes have been made to the timesheet and updated, the timesheet will become disputed. The timesheet will be sent back to the student for them to either agree to or to dispute. If they decide to dispute the timesheet, it will be sent to the system administrator to resolve the issue. Otherwise, if the student agrees to the changes you have made, the timesheet will be put back into the normal timesheet process.

To Edit the timesheet, press the **edit** button at the right-hand end of the timesheet, as shown below:
The page refreshes and displays the Edit Timesheet page.
Step 7

At the bottom of the page, adjust the End Time back to the original End Time of 22:00 and press the cyan coloured Update button, as shown below:

The page will refresh to show the Manage Timesheets page with a yellow message at the top stating that ‘The timesheet has been updated’.
Step 8
Select the **tick box** at the far left-hand end of the timesheet and press the red **dispute** button, as shown below:

![Timesheet Image]

Enter a note and press the green **OK** button.

![Confirmation Image]

The page will refresh to show the Manage Timesheets page with a yellow message at the top stating that ‘The selected items have been updated’.

![Manage Timesheets Image]
The workers Manage Timesheets page will have an indication that the timesheet has been disputed together with any notes that have been left for them, as shown below:

<table>
<thead>
<tr>
<th>Ref</th>
<th>Booking Title</th>
<th>Booking Type</th>
<th>Department</th>
<th>Location</th>
<th>Job Title</th>
<th>Date</th>
<th>Total Time</th>
<th>Total Pay (£)</th>
<th>Status</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>209114</td>
<td>Front of House Support</td>
<td>Post Job</td>
<td>Education Services</td>
<td>Student Services Centre</td>
<td>Cambassador (CLW)</td>
<td>20/06/2022 14:00 - 22:00</td>
<td>07:30</td>
<td>£4.41</td>
<td>Disputed</td>
<td>edit, expenses (0), notes (2)</td>
</tr>
</tbody>
</table>

Step 9
If the worker selects their Disputed button from the left-hand panel, as shown below, they can view any disputed timesheets. They would then have the choice of re-submitting them by ticking the box to the left of their timesheet and pressing the green re-submit button. Or editing the timesheet and reinstating the extra hour. The dispute process would then start again with system administrator possibly having to resolve the issue.

Finish
Approving a Draw Down timesheet with added expenses

Introduction and Description

The Department Manager wants to approve a Draw Down timesheet with mileage expenses added. They believe that the 100 miles mileage expense submitted by the Examiner (Walter Strike), was agreed before the work was completed, so needs to approve this payment. Walter Strike completed the booking from the Scenario 2 – Direct Booking Draw Down example below,

_The Department Coordinator wants to create a booking for an Examiner Payrate £22.10 (hourly rate) for the next 8 weeks (one Term). The total amount of work to be completed is 80 hours (roughly 10 hours per week but it varies)._

_This Examiner Payrate £22.10 has already agreed to the booking with the course organiser, so the Department Coordinator only wants to send it to one worker._
Step 1
Sign into the UAT Dashboard using your Department Manager account.
https://cambridgetest.demodashbordtechnology.co.uk
Step 2
Select the **Timesheets** button.
Step 3

The Manage Timesheets page will display all the timesheets you are managing. The Status column will indicate which timesheets are ready to approve (highlighted in yellow) and which ones are still with the worker (highlighted in cyan) for them to submit, plus timesheets you have approved (highlighted in green).

Any timesheet highlighted in red with a red dotted line indicates the worker has amended their timesheet, for example they have changed the hours they worked.
Step 4

To approve a timesheet, select the **To Approve** button from the left-hand panel.

The screen will refresh and will display the Manage Timesheets page.
Step 5

To view the expenses claimed for by the worker, select the **expenses** button at the far right-hand end of the timesheet, as shown below:

The page will refresh detailing the job booking date and time at the top of the screen with expenses underneath. The receipt link can be clicked and the uploaded receipt opened to view the details of the uploaded receipt.
Step 6

To approve a timesheet, navigate to the To Approve Manage Timesheet page using the left hand navigation panel, and tick the box at the left-hand end of the timesheet you want to approve. Finally press the green Approve button, as shown below:
Press **OK** again.

**Please Confirm**

Are you sure you want to approve the selected timesheets? (Please note: When selecting multiple timesheets you may be approving timesheets with zero hours.)

- **Ok**
- **Cancel**

**Step 7**

The page will refresh displaying a yellow message at the top stating that ‘The selected items have been updated’.
Step 8

To view all approved timesheets, select the Approved button from the left-hand panel.

All approved timesheets will be displayed.
Step 9

Selecting the **Timesheets** button from the left-hand menu will also show all timesheets including their status. Below we can see the timesheet we have approved for Walter Strike.

Finish