

DASHBOARD USER GUIDE ASSIGNING A REGISTERED WORKER TO A DEPARTMENT

ASSIGNING A REGISTERED WORKER TO A DEPARTMENT

Introduction and Description

A Department Manager wants to assign a registered worker to their department.

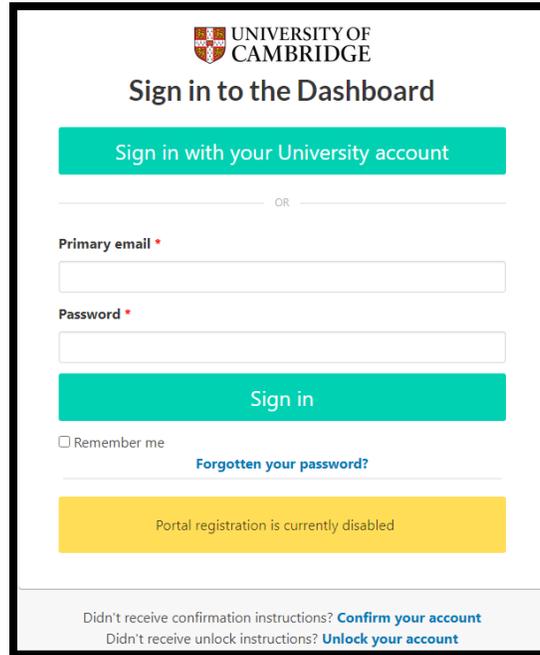
A worker has registered initially in the Department of Veterinary Medicine, but Education Services would also like to use the same worker for work in their department.

Note! As soon as Education Services have assigned the worker to their department, they will be able to include that worker in their bookings. There is no need to do any further RTW checks.

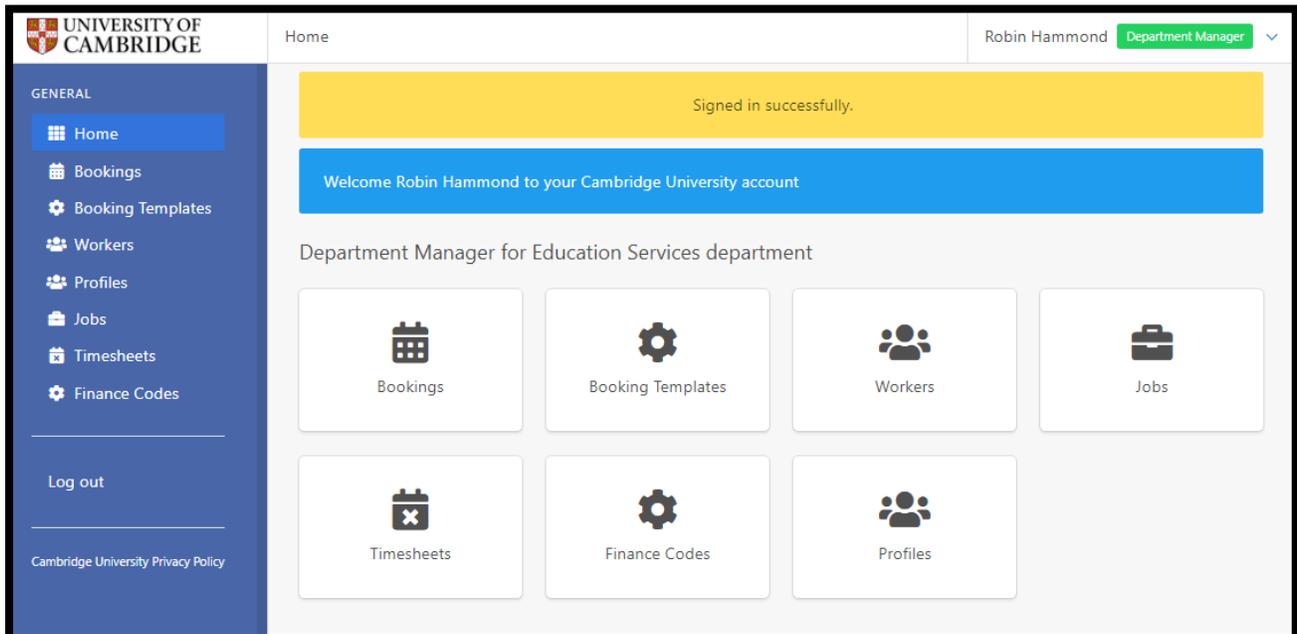
Step 1

Sign into the UAT Dashboard using your Department Manager account.

<https://cambridgetest.demodashboardtechnology.co.uk>



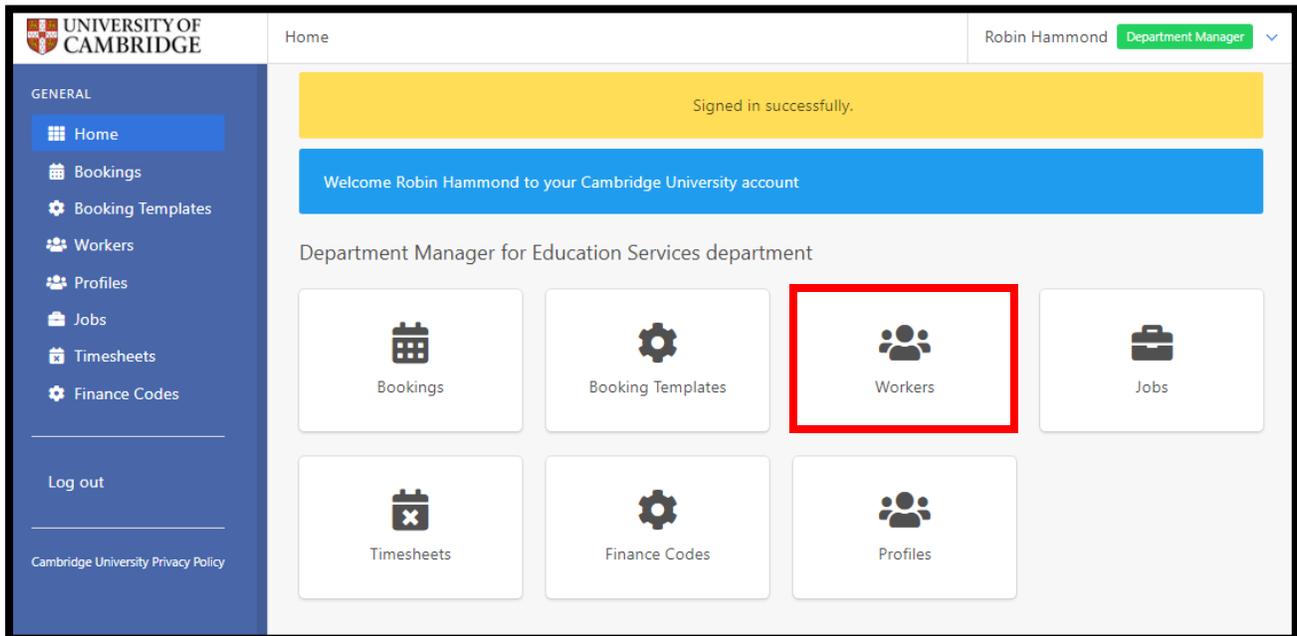
The image shows a sign-in form for the University of Cambridge. At the top is the University of Cambridge logo and the text "UNIVERSITY OF CAMBRIDGE". Below this is the heading "Sign in to the Dashboard". A prominent teal button says "Sign in with your University account". Underneath is a horizontal line with "OR" in the center. The form then asks for "Primary email" and "Password", each with a red asterisk and a corresponding input field. A teal "Sign in" button is below the password field. There is a checkbox for "Remember me" and a link for "Forgotten your password?". A yellow box at the bottom of the form states "Portal registration is currently disabled". At the very bottom, there are two links: "Didn't receive confirmation instructions? Confirm your account" and "Didn't receive unlock instructions? Unlock your account".



The image shows a screenshot of the dashboard after a successful login. The top left corner features the University of Cambridge logo and the text "UNIVERSITY OF CAMBRIDGE". The top right corner shows the user's name "Robin Hammond" and the role "Department Manager" with a dropdown arrow. The main content area is titled "Home" and displays a yellow banner with the text "Signed in successfully." Below this is a blue banner with the text "Welcome Robin Hammond to your Cambridge University account". The main content area is titled "Department Manager for Education Services department" and contains a grid of seven tiles: "Bookings", "Booking Templates", "Workers", "Jobs", "Timesheets", "Finance Codes", and "Profiles". Each tile has an icon representing its function. On the left side, there is a dark blue sidebar with the heading "GENERAL" and a list of menu items: "Home", "Bookings", "Booking Templates", "Workers", "Profiles", "Jobs", "Timesheets", and "Finance Codes". At the bottom of the sidebar are "Log out" and "Cambridge University Privacy Policy".

Step 2

Select the **Workers** button.



The screenshot displays the Cambridge University Department Manager interface. The top left corner features the University of Cambridge logo and the text "UNIVERSITY OF CAMBRIDGE". The top right corner shows the user's name "Robin Hammond" and the role "Department Manager" with a dropdown arrow. The main content area is titled "Home" and includes a yellow notification bar stating "Signed in successfully." and a blue welcome message: "Welcome Robin Hammond to your Cambridge University account". Below this, the user is identified as "Department Manager for Education Services department". A grid of seven buttons is shown, with the "Workers" button highlighted by a red border. The buttons are: Bookings, Booking Templates, Workers, Jobs, Timesheets, Finance Codes, and Profiles. A left-hand navigation menu is visible, listing "GENERAL" and various options including Home, Bookings, Booking Templates, Workers, Profiles, Jobs, Timesheets, and Finance Codes. At the bottom of the menu are "Log out" and "Cambridge University Privacy Policy" links.

Step 3

The page will refresh to show the 'Education Services Worker Pool' Page, or the Workers Pool page for the department you are working in.

All workers currently assigned to your department and available to be booked onto jobs will be listed here.

Worker Pool Robin Hammond Department Manager v

Education Services Worker Pool

Worker First Name **Qualifications** **Education**

Worker Last Name **Languages** **Employment**

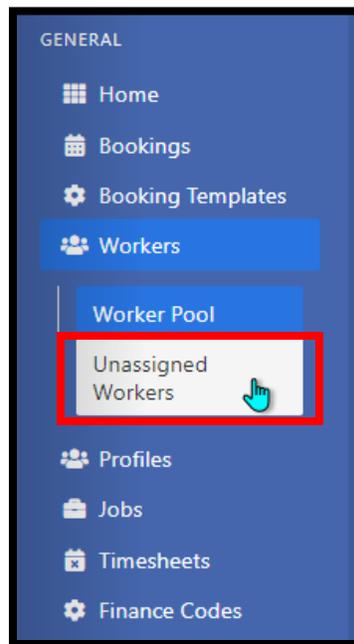
Job Preference

Search Clear Search

Worker	Job Preference	Qualifications	Languages	Education	Employment	Approved	Actions
Wilma May						18/05/2022 by Carrie Pennington	👁️ preview 📅 availability ✖️ unassign
Wilf Bevan						18/05/2022 by Carrie Pennington	👁️ preview 📅 availability ✖️ unassign

Step 4

Select the **Unassigned Workers** button from the left-hand menu.



The page will refresh and will list all workers outside of the current department worker pool.

Step 5

The 'Workers Outside of Worker Pool' list contains all unassigned workers.

You can see who originally approved the worker and on what date the worker was approved by looking under the **Approved** column.

Unassigned Workers Robin Hammond Department Manager ▾

Education Services Workers Outside of Worker Pool

Worker First Name **Qualifications** **Education**

Worker Last Name **Languages** **Employment**

Job Preference

Search Clear Search

Worker ▾	Job Preference	Qualifications	Languages	Education	Employment	Approved	Actions
Michael Davido						03/05/2022 by Ola Olomola	👁️ preview 📅 availability + assign
Justina Berbar						05/05/2022 by Ola Olomola	👁️ preview 📅 availability + assign
David Morgan						05/05/2022 by Ola Olomola	👁️ preview 📅 availability + assign
William Quinn						18/05/2022 by Carrie Pennington	👁️ preview 📅 availability + assign
Walter Strike						18/05/2022 by Carrie Pennington	👁️ preview 📅 availability + assign
Eric Dewhurst						22/06/2022 by Mary Malone	👁️ preview 📅 availability + assign
Peter Pantani						23/06/2022 by Mary Malone	👁️ preview 📅 availability + assign

Buttons are available to **preview** basic worker details, view their **availability** and **assign** a worker to your department. Clicking on their **name** will load their profile page.

Walter Strike						18/05/2022 by Carrie Pennington	👁️ preview 📅 availability + assign
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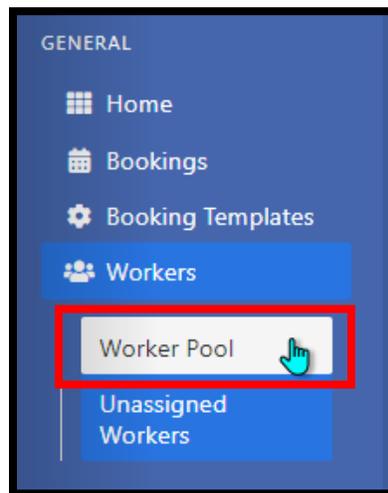
Step 6

To assign a worker (in this case Walter Strike) from this list to your department, simply press the green assign button to the right-hand end of their name.



Step 7

Select the Worker Pool button from the left-hand menu, as shown below:



Step 8

The page will display the Worker Pool for the department, in this case the 'Education Services Worker Pool'. Note that our worker (Walter Strike) is now listed and is therefore now available for job bookings.

Worker Pool Robin Hammond Department Manager ▾

Education Services Worker Pool

Worker First Name **Qualifications** **Education**

Worker Last Name **Languages** **Employment**

Job Preference

Search Clear Search

Worker	Job Preference	Qualifications	Languages	Education	Employment	Approved	Actions
Walter Strike						18/05/2022 by Carrie Pennington	👁 preview 📅 availability ✖ unassign
Wilma May						18/05/2022 by Carrie Pennington	👁 preview 📅 availability ✖ unassign
Wilf Bevan						18/05/2022 by Carrie Pennington	👁 preview 📅 availability ✖ unassign

Note. If you later wish to unassign a worker from your worker pool you simply select the red **unassign** button as shown below:

Walter Strike						18/05/2022 by Carrie Pennington	👁 preview 📅 availability ✖ unassign
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Finish