

## SCENARIO 2

### DIRECT BOOKING DRAW DOWN

#### Scenario Introduction and Description

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.

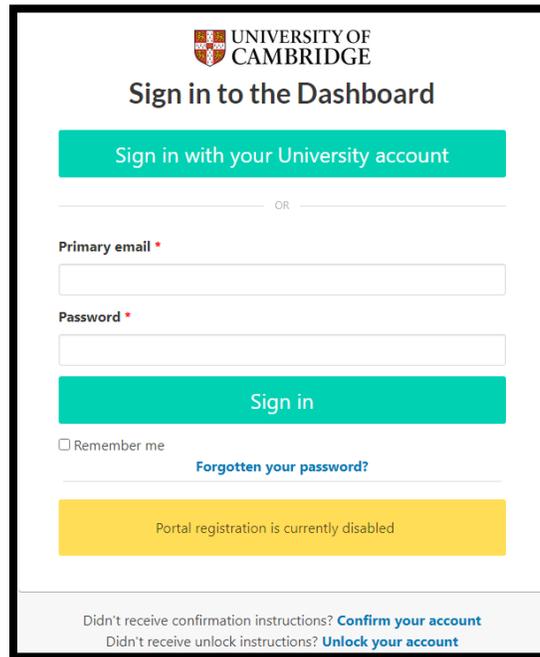
The **Direct Booking Draw Down** type of booking is used when the following criteria exists:

1. You have a specific worker in mind who you wish to employ.
2. The worker booking is for a set number of hours per week. However, it doesn't matter exactly when the work is carried out, in that there is no fixed time schedule or a specific day for when the work needs to be done. For example, the worker decides when to do the work, or possibly the job times vary during the week. As long as the worker works their 10 hours, during the course of the week, that is acceptable.

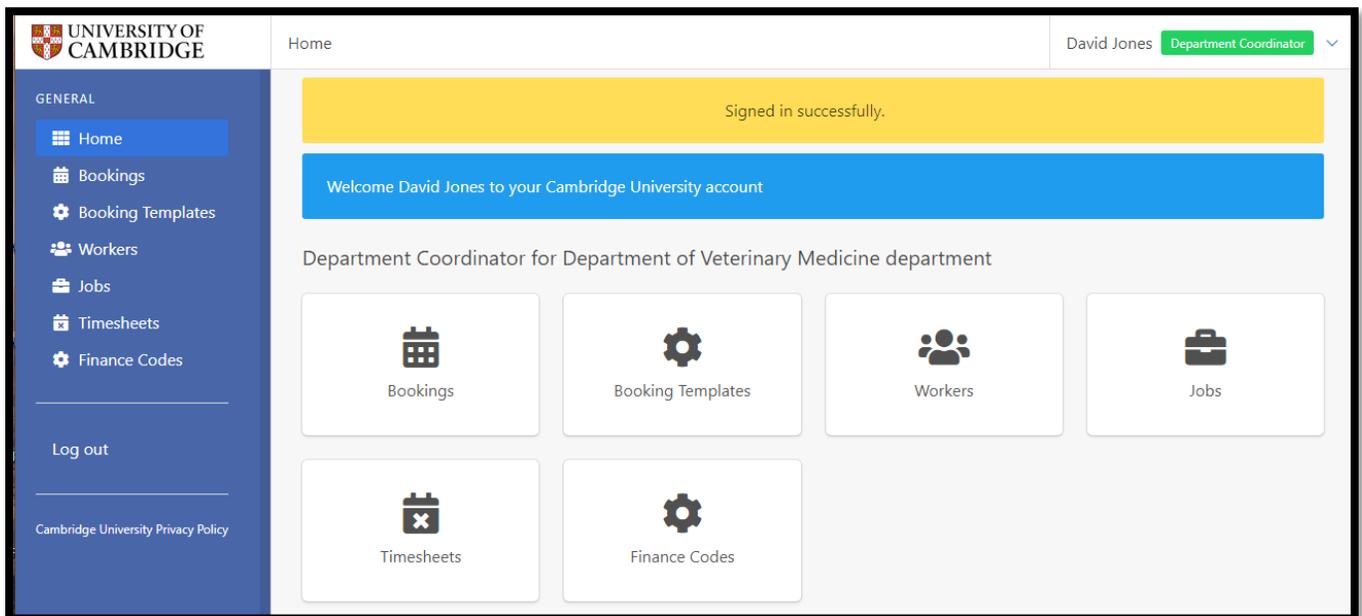
## Step 1

Sign into the UAT Dashboard using your Department Coordinator account.

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



The image shows a sign-in form for the University of Cambridge dashboard. 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 green 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 green "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 "David Jones" and their role "Department Coordinator" with a dropdown arrow. The main content area has a yellow banner that says "Signed in successfully." followed by a blue banner that says "Welcome David Jones to your Cambridge University account". Below these banners, the user's role is specified as "Department Coordinator for Department of Veterinary Medicine department". There are six icons representing different dashboard sections: Bookings, Booking Templates, Workers, Jobs, Timesheets, and Finance Codes. A left-hand navigation menu is visible, listing "GENERAL" with sub-items: Home, Bookings, Booking Templates, Workers, Jobs, Timesheets, Finance Codes, Log out, and Cambridge University Privacy Policy.

## Step 2

Select the **Bookings** button.

The screenshot shows the University of Cambridge Bookings dashboard. The user is logged in as David Jones, Department Coordinator. The dashboard displays a welcome message and a grid of buttons for various functions. The 'Bookings' button, represented by a calendar icon, is highlighted with a red border. Other buttons include Booking Templates, Workers, Jobs, Timesheets, and Finance Codes.

## Step 3

Our first step is to create the Booking itself. Once we have done this, we will then assign a worker to the booking.

On the **Bookings** page select the green +Draw Down button.

The screenshot shows the University of Cambridge Bookings page for the Department of Veterinary Medicine. The user is logged in as David Jones, Department Coordinator. The page displays a calendar view for May 16 - 22, 2022. The '+ Draw Down' button, located next to the 'Create a Booking' dropdown, is highlighted with a red border. The calendar shows a booking for Thursday, May 19/5, from 2:30pm to 2:00pm.

	Mon 16/5	Tue 17/5	Wed 18/5	Thu 19/5	Fri 20/5	Sat 21/5	Sun 22/5
all-day							
2pm							
2:30pm							

## Step 4

On the **Create new Draw Down Booking** page, choose **Direct Booking** from the **Booking Type** drop down menu.

Bookings / Create Booking David Jones Department Coordinator ▾

### Create new Draw Down Booking: Department of Veterinary Medicine

**Booking Title** \* ?

**Week commencing** \*

**Weekly Hours to be Worked** \* ?

Hours	Minutes
<input type="text" value="10"/>	<input type="text" value="0"/>

**Booking Type** \* ?

**Quantity** \* ?

 x

**Job** \* ?

**Unpaid Breaks (in minutes)** \* ?

**Expiry Date** \* ?

**Contact** ?

**Cost Code** \* ?

%

Delete

Add Cost Code

**Expenses Require Different Cost Code** \* ?

**Instructions for Workers** \* ?

If applicable, you can also provide here terms and conditions attached to this job

Normal ▾ A A B I U G ” ‹› ☰ ☷ ☹ ☺

Would you like to repeat this booking, starting this week?

Save this booking as a template? ?

CreateFind Workers

## Step 5

Complete the other fields as necessary, see screenshot plus field help tips below.

Bookings / Create Booking David Jones Department Coordinator

### Create new Draw Down Booking: Department of Veterinary Medicine

<b>Booking Title *</b> ⓘ <input type="text" value="Examiner Booking"/>	<b>Booking Type *</b> ⓘ <input type="text" value="Direct Booking"/>												
<b>Week commencing *</b> <input type="text" value="30/05/2022"/>	<b>Quantity *</b> ⓘ <input type="text" value="1"/> x <b>Job *</b> ⓘ <input type="text" value="Examiner - External (SP49)"/>												
<b>Weekly Hours to be Worked *</b> ⓘ <table border="0"><tr><td><b>Hours</b></td><td><b>Minutes</b></td></tr><tr><td><input type="text" value="10"/></td><td><input type="text" value="0"/></td></tr></table>	<b>Hours</b>	<b>Minutes</b>	<input type="text" value="10"/>	<input type="text" value="0"/>	<b>Pay Rates (per hour)</b> <table border="0"><tr><td>18 to 20</td><td>under 18</td><td>23 and over</td><td>21 to 22</td></tr><tr><td><input type="text" value="£22.10"/></td><td><input type="text" value="£22.10"/></td><td><input type="text" value="£22.10"/></td><td><input type="text" value="£22.10"/></td></tr></table>	18 to 20	under 18	23 and over	21 to 22	<input type="text" value="£22.10"/>	<input type="text" value="£22.10"/>	<input type="text" value="£22.10"/>	<input type="text" value="£22.10"/>
<b>Hours</b>	<b>Minutes</b>												
<input type="text" value="10"/>	<input type="text" value="0"/>												
18 to 20	under 18	23 and over	21 to 22										
<input type="text" value="£22.10"/>	<input type="text" value="£22.10"/>	<input type="text" value="£22.10"/>	<input type="text" value="£22.10"/>										
<b>Expiry Date *</b> ⓘ <input type="text" value="20/05/2022"/> <input type="text" value="15:00"/>	<b>Unpaid Breaks (in minutes) *</b> ⓘ <input type="text" value="0"/>												
<b>Contact</b> ⓘ <input type="text" value="None"/>	<b>Instructions for Workers *</b> ⓘ <small>If applicable, you can also provide here terms and conditions attached to this job</small> <div style="border: 1px solid #ccc; padding: 5px;"><p>Normal <input type="text"/> <b>A</b> <input type="text"/> <b>B</b> <b>I</b> <b>U</b> <input type="text"/> <b>”</b> <b>“</b> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p></div>												
<b>Cost Code *</b> ⓘ <input type="text" value="PNAG/685.01.G107217 - -"/> % <input type="text" value="100"/> <span>Delete</span> <span>Add Cost Code</span>													
<b>Expenses Require Different Cost Code *</b> ⓘ <input type="text" value="No"/>													
<input checked="" type="checkbox"/> <b>Would you like to repeat this booking, starting this week?</b> For how many more weeks would you like to repeat this booking? <input type="text" value="8"/> On which days? <input type="text" value="Mon"/> <input checked="" type="checkbox"/>													
<input type="checkbox"/> <b>Save this booking as a template?</b> ⓘ													
<span>Create</span> <span>Find Workers</span>													

### Title

Enter a title for your booking. Include enough information so you and other staff members using the system will understand it. Do not make it too short or too long.

## Week commencing

This is the week commencing date of the booking, in other words, the week the worker will start their work for you.

## Hours to be worked

This is the total number of hours you are requesting the worker to work, during the course of the week.

## Expiry Date

This is the cutoff date and time you choose to fill the booking with a worker. If the worker, you have chosen has not responded by this date and time then you need to find another worker to fulfil the booking.

## Contact

If you have a member of staff responsible for this booking, or possibly in charge of running the event and they can act as a contact for the worker then they can be entered here.

## Cost Code

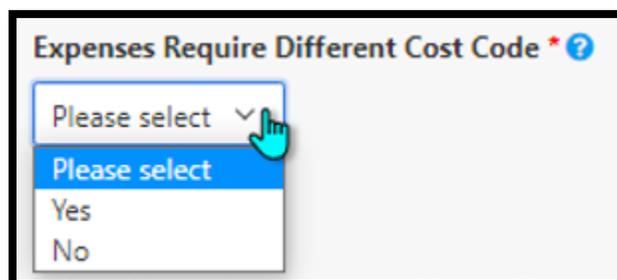
Enter the appropriate cost code and percentage for this booking. In other words, how is it being paid for or who is paying for the work.

**Note!** It is possible to split a booking into multiple cost codes (up to five different codes) adding the percentage each cost code will pay. The total must add up to 100%.

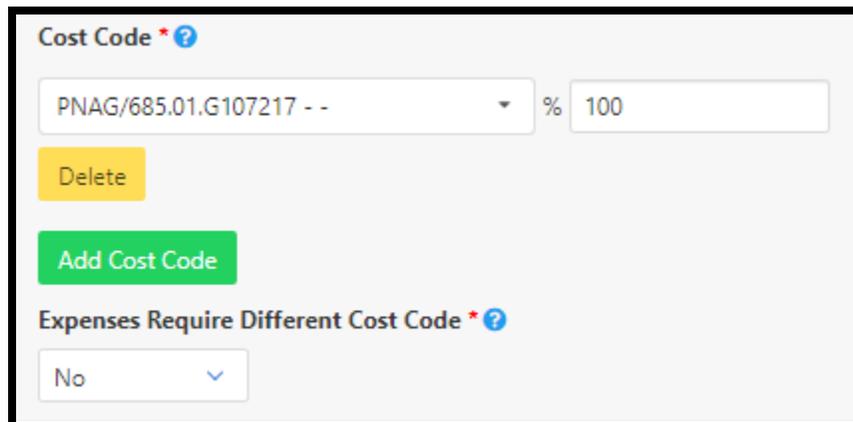
If you wish to do this enter the first cost code and percentage and then select the green **Add Cost Code** button.

## Expenses Require Different Cost Code

From this drop-down field, **Yes** or **No** can be selected.



If **No** is chosen, then any expenses claimed by the worker will be paid for using the Cost Code from above.



Cost Code \* ?

PNAG/685.01.G107217 - - % 100

Delete

Add Cost Code

Expenses Require Different Cost Code \* ?

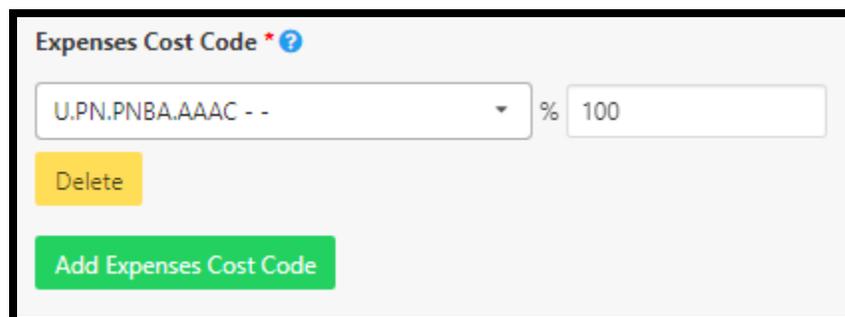
No

If **Yes** is chosen, an extra panel will appear with an additional drop down and percentage fields for the Expense Cost Code.

**Note!** It is possible to split an Expense into multiple cost codes (up to five different codes) adding the percentage each cost code will pay. The total must add up to 100%.

If you wish to do this enter the first cost code and percentage and then select the green **Add Expenses Cost Code** button.

Hover over the blue help tip icon for more information.



Expenses Cost Code \* ?

U.PN.PNBA.AAAC - - % 100

Delete

Add Expenses Cost Code

## Quantity

This field is for you to enter the number of workers you require. In this scenario it is just the one.

## Job

Select the appropriate job from this drop-down menu. Doing so will then populate the hourly rate shown in the blue boxes.

**Note!** If the Job Title and associated pay rate you need does not appear, you will need to contact [casual.workers@admin.cam.ac.uk](mailto:casual.workers@admin.cam.ac.uk) and ask them to add the new role details.



The screenshot shows a form with the following elements:

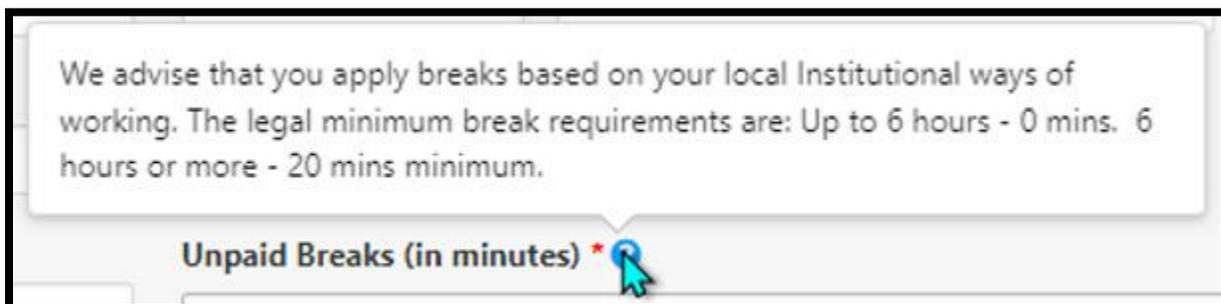
- Quantity \* ?**: A text input field containing the number '1'.
- Job \* ?**: A dropdown menu with the selected option 'Examiner - External (SP49)'.
- Pay Rates (per hour)**: A section with four columns representing different age groups and their corresponding pay rates, each in a blue button:
  - 18 to 20: £22.10
  - under 18: £22.10
  - 23 and over: £22.10
  - 21 to 22: £22.10

## Event

If your job booking is for a specific event which had been created in the system, you can select it from here. Otherwise choose **None**.

## Unpaid Breaks

A worker is allowed a 20-minute (minimum) break after 6 hours of work. As our worker is working a draw down scenario and can take a break when they like, in this case it does not apply, so 0 (the number of minutes) is entered in this field. For more information, hover over the help tip icon.



## Instructions for Worker

Enter any further instructions for your worker in here. These instructions will be emailed to the worker so include information such as a specific location where the work will take place, contact, or phone number.

## Repeat Booking

It is possible to set up a repeat booking by checking this tick box. In our example the total amount of work to be completed is 80 hours (roughly 10 hours per week but it varies). Therefore, we need to tick this box. We then enter in the number of weeks, in this case 8, and the start day of the week.

**Would you like to repeat this booking, starting this week?**

**For how many more weeks would you like to repeat this booking?**

8

**On which days?**

Mon

### Saving a booking as a template

If this type of booking is going to be a regular occurrence, then it's worth saving this as a template by checking this tick box.

**Save this booking as a template?** [?](#)

### Creating the booking

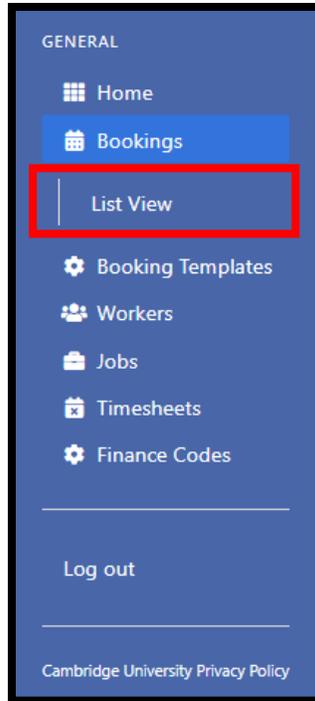
Lastly press the green **Create** button.



## Step 6

Assigning a worker to the booking.

As this is a Draw Down Booking, it will not be displayed in the calendar view, so select **List View** from the left-hand menu.



## Step 7

Locate your bookings in the **Bookings List**.

Filter options are available at the top if required.

Bookings List
David Jones Department Coordinator ▾

### All Department of Veterinary Medicine Bookings

Go

+ Booking
+ Draw Down

**Booking Title**

**Booking Date From:**

**Creator First Name**

**Booking Reference Match**

**Booking Date To:**

**Creator Last Name**

**Booking Mode**

**Contact First Name**

**Last Modified From:**

**Booking Type**

**Contact Last Name**

**Last Modified To:**

**Booking Status** All Statuses ▾

Search

Clear Search

Booking Title	Ref	Booking Mode	Booking Type	Booking Date	Start Time	End Time	Contact	Department	Status	Creator	Last Modified
Examiner Booking	209039	Draw Down	Direct Booking	25/07/2022	DD	10 hours		Department of Veterinary Medicine	Draft	David Jones	20/05/2022 12:31:38
Examiner Booking	209038	Draw Down	Direct Booking	18/07/2022	DD	10 hours		Department of Veterinary Medicine	Draft	David Jones	20/05/2022 12:31:38
Examiner Booking	209037	Draw Down	Direct Booking	11/07/2022	DD	10 hours		Department of Veterinary Medicine	Draft	David Jones	20/05/2022 12:31:38
Examiner Booking	209036	Draw Down	Direct Booking	04/07/2022	DD	10 hours		Department of Veterinary Medicine	Draft	David Jones	20/05/2022 12:31:38
Examiner Booking	209035	Draw Down	Direct Booking	27/06/2022	DD	10 hours		Department of Veterinary Medicine	Draft	David Jones	20/05/2022 12:31:38
Examiner Booking	209034	Draw Down	Direct Booking	20/06/2022	DD	10 hours		Department of Veterinary Medicine	Draft	David Jones	20/05/2022 12:31:38
Examiner Booking	209033	Draw Down	Direct Booking	13/06/2022	DD	10 hours		Department of Veterinary Medicine	Draft	David Jones	20/05/2022 12:31:38
Examiner Booking	209032	Draw Down	Direct Booking	06/06/2022	DD	10 hours		Department of Veterinary Medicine	Draft	David Jones	20/05/2022 12:31:38
Examiner Booking	209031	Draw Down	Direct Booking	30/05/2022	DD	10 hours		Department of Veterinary Medicine	Draft	David Jones	20/05/2022 12:31:37
Examiner Booking	209030	Draw Down	Direct Booking	30/05/2022	DD	10 hours		Department of Veterinary Medicine	Cancelled	David Jones	20/05/2022 12:26:38
Lecturer Booking	209029	Standard	Direct Booking	24/05/2022	09:00	13:00		Department of Veterinary Medicine	Accepted full	David Jones	19/05/2022 15:41:45

The **Booking Date** column can be sorted by date order, to either the newest or oldest booking at the top of the list, by clicking on the Booking Date header.

Booking Title ⇅	Ref ⇅	Booking Mode ⇅	Booking Type ⇅	Booking Date ▼
Lecturer Booking	209029	Standard	Direct Booking	24/05/2022
Examiner Booking	209030	Draw Down	Direct Booking	30/05/2022
Examiner Booking	209031	Draw Down	Direct Booking	30/05/2022
Examiner Booking	209032	Draw Down	Direct Booking	06/06/2022
Examiner Booking	209033	Draw Down	Direct Booking	13/06/2022
Examiner Booking	209034	Draw Down	Direct Booking	20/06/2022
Examiner Booking	209035	Draw Down	Direct Booking	27/06/2022
Examiner Booking	209036	Draw Down	Direct Booking	04/07/2022
Examiner Booking	209037	Draw Down	Direct Booking	11/07/2022
Examiner Booking	209038	Draw Down	Direct Booking	18/07/2022
Examiner Booking	209039	Draw Down	Direct Booking	25/07/2022

## Step 8

Locate the first booking in the **Bookings List**, for which you want to assign a worker, and click on the Booking Title to open it.

Examiner Booking	209031	Draw Down	Direct Booking	30/05/2022	DD	10 hours		Department of Veterinary Medicine	<a href="#">Draft</a>	David Jones	20/05/2022 12:31:37
Examiner Booking	209032	Draw Down	Direct Booking	06/06/2022	DD	10 hours		Department of Veterinary Medicine	<a href="#">Draft</a>	David Jones	20/05/2022 12:31:38
Examiner Booking	209033	Draw Down	Direct Booking	13/06/2022	DD	10 hours		Department of Veterinary Medicine	<a href="#">Draft</a>	David Jones	20/05/2022 12:31:38
Examiner Booking	209034	Draw Down	Direct Booking	20/06/2022	DD	10 hours		Department of Veterinary Medicine	<a href="#">Draft</a>	David Jones	20/05/2022 12:31:38
Examiner Booking	209035	Draw Down	Direct Booking	27/06/2022	DD	10 hours		Department of Veterinary Medicine	<a href="#">Draft</a>	David Jones	20/05/2022 12:31:38
Examiner Booking	209036	Draw Down	Direct Booking	04/07/2022	DD	10 hours		Department of Veterinary Medicine	<a href="#">Draft</a>	David Jones	20/05/2022 12:31:38
Examiner Booking	209037	Draw Down	Direct Booking	11/07/2022	DD	10 hours		Department of Veterinary Medicine	<a href="#">Draft</a>	David Jones	20/05/2022 12:31:38
Examiner Booking	209038	Draw Down	Direct Booking	18/07/2022	DD	10 hours		Department of Veterinary Medicine	<a href="#">Draft</a>	David Jones	20/05/2022 12:31:38
Examiner Booking	209039	Draw Down	Direct Booking	25/07/2022	DD	10 hours		Department of Veterinary Medicine	<a href="#">Draft</a>	David Jones	20/05/2022 12:31:38



## Step 10

At the top of the **Find Workers** page a yellow message will be displayed at the top, stating 'This booking is part of repeat booking. When you are selecting workers, they will be assigned to every related booking.'

Select the **Filter** button at the top of the right-hand panel to view a list of available workers.

The screenshot shows the 'Bookings / Find Workers' interface. At the top right, the user is identified as 'David Jones' with the role 'Department Coordinator'. A yellow banner at the top contains the message: 'This booking is part of repeat booking. When you are selecting workers, they will be assigned to every related booking.' Below this, the booking details are shown: 'Booking Ref: 209031' and 'Date: 30/05/2022 - 05/06/2022'. A blue button prompts the user to 'Please set your search filters and click "Filter" to find workers.' Below this are 'Cancel Booking' and 'Edit Booking' buttons. On the right, a filter panel is visible, with a red box highlighting the 'Filter' button. The filter panel includes a 'Sort by' dropdown set to 'select' and 'Asc', and several checkboxes: 'Availability', 'Preferences', 'Exclude Rejected?', and '48hrs opt out?'. There are also dropdown menus for 'Valid DBS?' (set to 'None'), 'Year of Study' (set to 'None Selected'), 'Student Type' (set to 'None Selected'), and 'Language' (set to 'None Selected'). Text input fields are provided for 'First Name', 'Last Name', 'Distance (in miles):', 'Department Name', 'Qualification Name OR Course Title', and 'Employment'. A checkbox at the bottom of the panel is labeled 'My department pool only' and is checked. Another checkbox at the very bottom is labeled 'Previously booked for same job title?'.

**Note!** Although the Filter panel allows you to filter workers on various criteria, you can simply press the **Filter** button to list all workers available in your department.

## Step 11

Your workers will now be listed. Tick the box to the left of the name of the worker you wish to book. Then press the green **Book Workers** button.

The screenshot shows the 'Bookings / Find Workers' interface. At the top, it says 'This booking is part of repeat booking. When you are selecting workers, they will be assigned to every related booking.' Below this, the booking reference is 209031 and the date range is 30/05/2022 - 05/06/2022. A message states 'You may select 1 worker for this booking.' A table lists two workers: William Quinn and Walter Strike. Walter Strike's selection box is checked and highlighted with a red box. Below the table, there are buttons for 'Book Workers' (highlighted with a red box), 'Schedule for later', 'Cancel Booking', and 'Edit Booking'. On the right, there is a 'Filter' panel with various options like 'Sort by', 'Availability', 'Preferences', and 'My department pool only' (checked).

Select All On Page	Full Name	View	Course Title	Hours Worked (this week)	Hours Remaining (this week)	Pay Rate	Previously Cancelled
<input type="checkbox"/>	William Quinn	Profile Availability		00:00	48:00	£22.10	No
<input checked="" type="checkbox"/>	Walter Strike	Profile Availability		00:00	48:00	£22.10	No

## Step 12

Select the **List View** of your bookings by selecting **List View** from the left-hand menu.

The screenshot shows a table of bookings. The table has columns for booking ID, status, booking type, date, and status. A tooltip is shown over the 'Accepted full' button in the status column, displaying 'Confirmed workers: Walter Strike'.

Booking ID	Status	Booking Type	Date	Status
209031	Draw Down	Direct Booking	30/05/2022	DD 10 hours
209032	Draw Down	Direct Booking	06/06/2022	DD 10 hours
209033	Draw Down	Direct Booking	13/06/2022	DD 10 hours
209034	Draw Down	Direct Booking	20/06/2022	DD 10 hours
209035	Draw Down	Direct Booking	27/06/2022	DD 10 hours
209036	Draw Down	Direct Booking	04/07/2022	DD 10 hours
209037	Draw Down	Direct Booking	11/07/2022	DD 10 hours
209038	Draw Down	Direct Booking	18/07/2022	DD 10 hours
209039	Draw Down	Direct Booking	25/07/2022	DD 10 hours

The booking job list will now be updated. Hovering over the green **Accepted Full** button in the **Status** column at the right-hand end of the booking will show the name of the worker you have assigned to the Job Booking.

## Finish