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://cambridge.test.demodashboardtechnology.co.uk
Step 2

Select the **Bookings** button.

![Image of the Bookings button on the University of Cambridge dashboard]

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.

![Image of the Bookings page on the University of Cambridge dashboard with the Draw Down button highlighted]

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Step 4

On the **Create new Draw Down Booking** page, choose **Direct Booking** from the **Booking Type** drop down menu.
Step 5
Complete the other fields as necessary, see screenshot plus field help tips below.

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](image)

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](image)

**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 and ask them to add the new role details.

![Quantity and Job Selection](image)

**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.

![Unpaid Breaks Help Tip](image)

**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.
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.

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.
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.

<table>
<thead>
<tr>
<th>Booking Title</th>
<th>Ref</th>
<th>Booking Mode</th>
<th>Booking Type</th>
<th>Booking Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lecturer Booking</td>
<td>209029</td>
<td>Standard</td>
<td>Direct Booking</td>
<td>24/05/2022</td>
</tr>
<tr>
<td>Examiner Booking</td>
<td>209030</td>
<td>Draw Down</td>
<td>Direct Booking</td>
<td>30/05/2022</td>
</tr>
<tr>
<td>Examiner Booking</td>
<td>209031</td>
<td>Draw Down</td>
<td>Direct Booking</td>
<td>30/05/2022</td>
</tr>
<tr>
<td>Examiner Booking</td>
<td>209032</td>
<td>Draw Down</td>
<td>Direct Booking</td>
<td>06/06/2022</td>
</tr>
<tr>
<td>Examiner Booking</td>
<td>209033</td>
<td>Draw Down</td>
<td>Direct Booking</td>
<td>13/06/2022</td>
</tr>
<tr>
<td>Examiner Booking</td>
<td>209034</td>
<td>Draw Down</td>
<td>Direct Booking</td>
<td>20/06/2022</td>
</tr>
<tr>
<td>Examiner Booking</td>
<td>209035</td>
<td>Draw Down</td>
<td>Direct Booking</td>
<td>27/06/2022</td>
</tr>
<tr>
<td>Examiner Booking</td>
<td>209036</td>
<td>Draw Down</td>
<td>Direct Booking</td>
<td>04/07/2022</td>
</tr>
<tr>
<td>Examiner Booking</td>
<td>209037</td>
<td>Draw Down</td>
<td>Direct Booking</td>
<td>11/07/2022</td>
</tr>
<tr>
<td>Examiner Booking</td>
<td>209038</td>
<td>Draw Down</td>
<td>Direct Booking</td>
<td>18/07/2022</td>
</tr>
<tr>
<td>Examiner Booking</td>
<td>209039</td>
<td>Draw Down</td>
<td>Direct Booking</td>
<td>25/07/2022</td>
</tr>
</tbody>
</table>
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.
Step 9
The booking will open. At the bottom of the panel, select the green **Find Workers** button.
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.

![Filter button highlighted in the screenshot](image)

**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.

![Bookings interface](image)

Step 12

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

![List View interface](image)

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