

SCENARIO 1

DIRECT BOOKING WITH FIXED HOURS

Scenario Introduction and Description

The Department Coordinator wants to create a booking for a Lecturer Payrate £80.05 (hourly rate) 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.

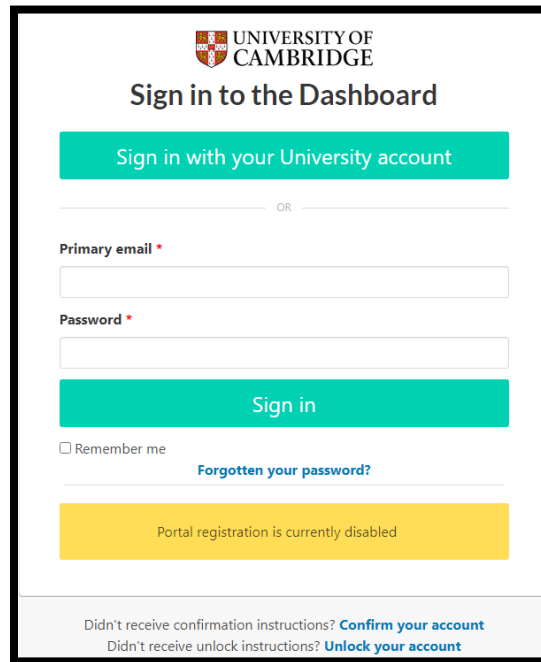
The **Direct Booking with Fixed Hours** type of booking is used when the following criteria exists:

1. You have a specific worker in mind who you wish to employ.
2. The worker booking is for a set number of hours, at a specific time, on a specific day.

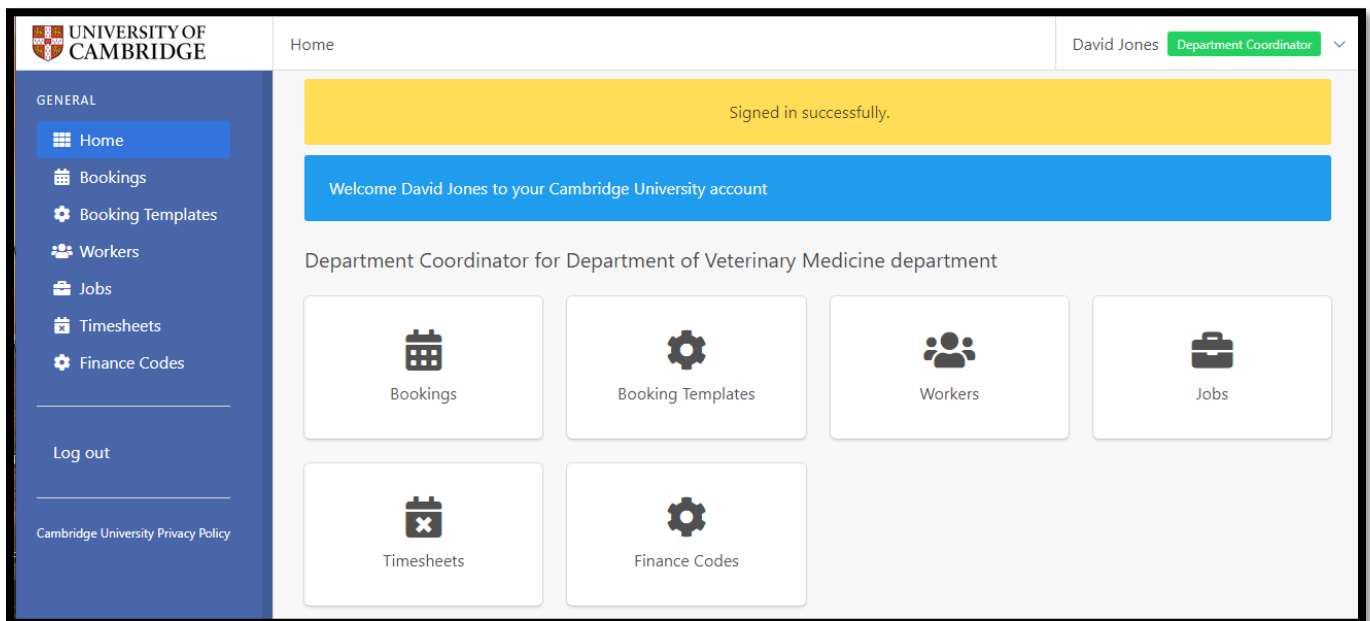
Step 1

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 "Sign in to the Dashboard". Below this is a green button labeled "Sign in with your University account". Underneath is a horizontal line with "OR" in the center. The form then has two input fields: "Primary email" and "Password", both with red asterisks indicating they are required. Below the password field is a green "Sign in" button. There is a checkbox for "Remember me" and a link for "Forgotten your password?". At the bottom of the form is a yellow box stating "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 sign-in. The top left corner features the University of Cambridge logo. 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 displayed: "Department Coordinator for Department of Veterinary Medicine department". There are six tiles representing different dashboard sections: "Bookings", "Booking Templates", "Workers", "Jobs", "Timesheets", and "Finance Codes". Each tile has a corresponding icon. On the left side, there is a dark blue sidebar with a "GENERAL" section containing links for "Home", "Bookings", "Booking Templates", "Workers", "Jobs", "Timesheets", and "Finance Codes". At the bottom of the sidebar are "Log out" and "Cambridge University Privacy Policy" links.

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 box. 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 +Booking button.

The screenshot shows the University of Cambridge Bookings page for the Department of Veterinary Medicine. The page displays a calendar view for May 16 - 22, 2022. The '+ Booking' button is highlighted with a red box. The page also shows a 'Create a Booking' dropdown menu and a 'Draw Down' button.

| | 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 Booking** page, choose **Direct Booking** from the **Booking Type** drop down menu.

The screenshot shows a web form titled "Create new Booking: Department of Veterinary Medicine". The user is logged in as "David Jones" with the role of "Department Coordinator". The form contains several input fields and dropdown menus:

- Title**: An empty text input field.
- Booking Type**: A dropdown menu with "Direct Booking" selected. This field is highlighted with a red rectangular box.
- Booking Date**: A date input field containing "19/05/2022".
- Start Time**: A time input field containing "17:00".
- End Time**: A time input field containing "18:00".
- Expiry Date**: Two date input fields, the first containing "19/05/2022" and the second containing "16:00".
- Contact**: A dropdown menu with "None" selected.
- Cost Code**: A dropdown menu with "Please Select" and a percentage input field set to "100". Below this are "Delete" and "Add Cost Code" buttons.
- Quantity**: A numeric input field containing "1" and a unit "x".
- Job**: A dropdown menu with "Please Select".
- Event**: A dropdown menu with "None".
- Unpaid Breaks**: A numeric input field containing "0".
- Instructions for Workers**: A rich text editor with a toolbar and a large empty text area.

At the bottom of the form, there are two checkboxes:

- Would you like to repeat this booking, starting this week?
- Save this booking as a template?

At the very bottom, there are two buttons: "Create" and "Find 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 Booking: Department of Veterinary Medicine

To use a previous booking as a template, choose from below

Please Select Use Template

| | | | | | | | | | |
|---|--|-------------|----------|-------------|----------|--------|--------|--------|--------|
| <p>Booking Title * ?</p> <p>Lecturer Booking</p> <p>Booking Date * ?</p> <p>24/05/2022</p> <p>Start Time * ?</p> <p>09:00</p> <p>End Time * ?</p> <p>13:00</p> <p>Expiry Date * ?</p> <p>20/05/2022 16:00</p> <p>Contact ?</p> <p>None</p> <p>Cost Code * ?</p> <p>PNAG/685.01.G107217 - - % 100</p> <p>Delete</p> <p>Add Cost Code</p> <p>Expenses Require Different Cost Code * ?</p> <p>No</p> | <p>Booking Type * ?</p> <p>Direct Booking</p> <p>Quantity * ? Job * ?</p> <p>1 x Lecturer - Standard</p> <p>Pay Rates (per hour)</p> <table border="0" style="width: 100%;"><tr><td>18 to 20</td><td>under 18</td><td>23 and over</td><td>21 to 22</td></tr><tr><td>£80.05</td><td>£80.05</td><td>£80.05</td><td>£80.05</td></tr></table> <p>Unpaid Breaks (in minutes) * ?</p> <p>0</p> <p>Instructions for Workers * ?</p> <p>If applicable, you can also provide here terms and conditions attached to this job</p> <p>Normal A B I U S ” «» ☰ ☷ ☰ ☷</p> | 18 to 20 | under 18 | 23 and over | 21 to 22 | £80.05 | £80.05 | £80.05 | £80.05 |
| 18 to 20 | under 18 | 23 and over | 21 to 22 | | | | | | |
| £80.05 | £80.05 | £80.05 | £80.05 | | | | | | |

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

Save this booking as a template? ?

Create Find Workers

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.

Booking Date

This is the date of the booking, in other words, the date the worker will come and do their work for you.

Start Time

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

End Time

This is the end time of the booking, in other words, the time the worker will finish their work for you.

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.

Hover over the blue help tip icon for more information.

Expenses Require Different Cost Code

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

Expenses Require Different Cost Code * ?

Please select

Please select

Yes

No

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

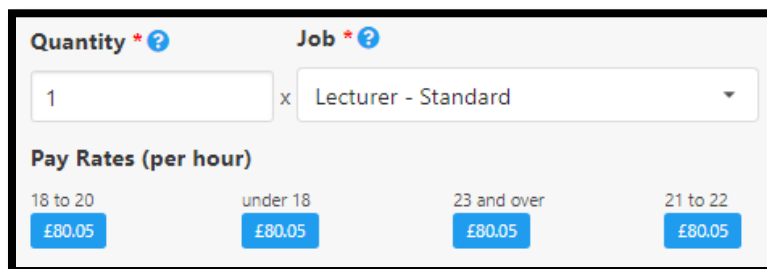
Quantity

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 and ask them to add the new role details.



Quantity * ? 1 x Job * ? Lecturer - Standard

Pay Rates (per hour)

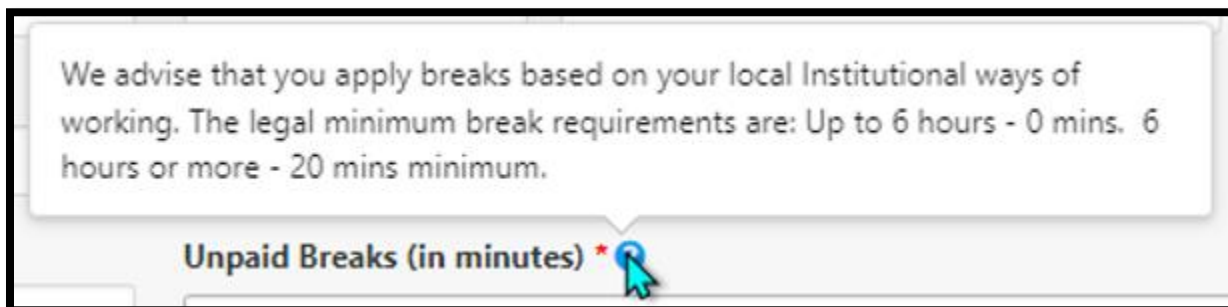
| | | | |
|----------|----------|-------------|----------|
| 18 to 20 | under 18 | 23 and over | 21 to 22 |
| £80.05 | £80.05 | £80.05 | £80.05 |

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 only working 4 hours, 0 (the number of minutes) is entered in this field. For more information, hover over the help tip icon.



We advise that you apply breaks based on your local Institutional ways of working. The legal minimum break requirements are: Up to 6 hours - 0 mins. 6 hours or more - 20 mins minimum.

Unpaid Breaks (in minutes) * ?

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. An example of this would be if you require the Lecturer every Tuesday from 09:00 to 13:00 for 4 weeks.

Would you like to repeat this booking, starting this 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.

Save this booking as a template? 

Creating the booking

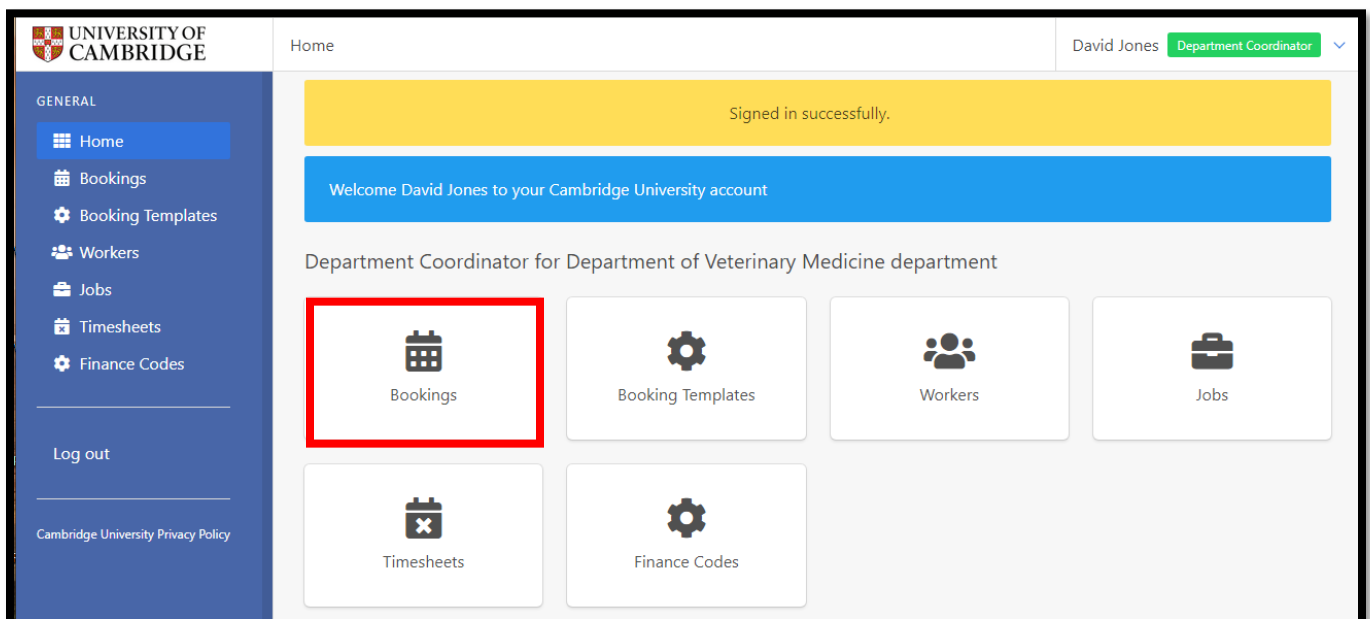
Lastly press the green **Create** button.

Create

Step 6

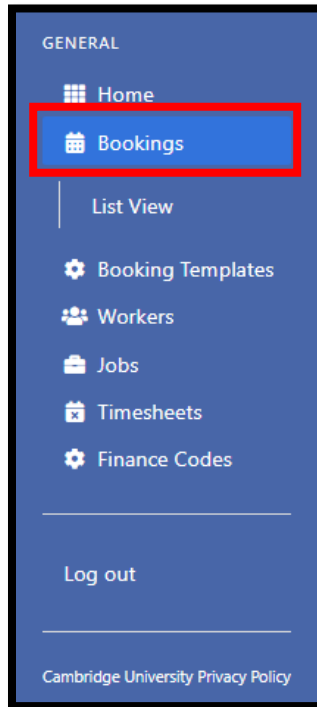
Assigning a worker to the booking.

Select the Bookings page either by selecting the **Bookings** button from the **Home** screen.



The screenshot shows the University of Cambridge Bookings system interface. At the top left is the University of Cambridge logo. The top navigation bar includes 'Home' and the user's name 'David Jones' with the role 'Department Coordinator'. A yellow banner indicates 'Signed in successfully.' Below this is a blue banner with the message 'Welcome David Jones to your Cambridge University account'. The main content area is titled 'Department Coordinator for Department of Veterinary Medicine department' and features a grid of six buttons: 'Bookings', 'Booking Templates', 'Workers', 'Jobs', 'Timesheets', and 'Finance Codes'. The 'Bookings' button is highlighted with a red border. A left-hand sidebar contains a 'GENERAL' section with links to 'Home', 'Bookings', 'Booking Templates', 'Workers', 'Jobs', 'Timesheets', and 'Finance Codes', along with a 'Log out' button and a link to the 'Cambridge University Privacy Policy'.

Or by selecting the Bookings page from the left-hand menu.



Step 7

Locate your booking in the calendar.

The screenshot shows the 'Bookings' interface for the 'Department of Veterinary Medicine'. At the top, there's a header with the user's name 'David Jones' and role 'Department Coordinator'. Below that, the department name is displayed, along with a dropdown menu for 'Department of Veterinary Medicine' and a 'Go' button. There are also buttons for 'Create a Booking', 'Draw Down', and '+ Booking'. The main area is a calendar for the week of May 23-29, 2022. The calendar shows a booking on Tuesday, May 24th, from 9:00 AM to 1:00 PM. The booking details are: '209029 - Lecturer Booking - Department of Veterinary Medicine'. The calendar grid has columns for each day of the week and rows for each hour of the day.

| | Mon 23/5 | Tue 24/5 | Wed 25/5 | Thu 26/5 | Fri 27/5 | Sat 28/5 | Sun 29/5 |
|---------|----------|--|----------|----------|----------|----------|----------|
| all-day | | | | | | | |
| 8:30am | | | | | | | |
| 9am | | 9:00 AM - 1:00 PM 209029 - Lecturer Booking - Department of Veterinary Medicine | | | | | |
| 9:30am | | | | | | | |
| 10am | | | | | | | |
| 10:30am | | | | | | | |
| 11am | | | | | | | |
| 11:30am | | | | | | | |
| 12pm | | | | | | | |
| 12:30pm | | | | | | | |
| 1pm | | | | | | | |

It will be coloured blue, indicating that a worker has yet to be assigned to the booking.
Click on the booking to open it.

At the bottom of the page select the **Find Workers** button.

Bookings / Configure Booking David Jones Department Coordinator

Configure Booking: Department of Veterinary Medicine

Booking Ref: 209029 Booking created by: David Jones

Title ?
Lecturer Booking

Booking Date ?
24/05/2022

Start Time ?
09:00

End Time ?
13:00

Expiry Date ?
20/05/2022
16:00

Contact ?
None

Cost Code ?
PNAG/685.01.G107217 - - % 100
Delete
Add Cost Code

Expenses Require Different Cost Code ?
No

Would you like to repeat this booking, starting this week?
 Save this booking as a template? ?

Update Find Workers Cancel Booking

Booking Type ?
Direct Booking

Quantity ? **Job** ?
1 x Lecturer - Standard

Pay Rates (per hour)
18 to 20 £80.05 under 18 £80.05 23 and over £80.05 21 to 22 £80.05

Event ?
None

Unpaid Breaks ?
0

Instructions for Workers ?
If applicable, you can also provide here terms and conditions attached to this job

Normal A B I U G L R E E

Step 8

On the **Find Workers** page select the **Filter** button at the top of the right-hand panel.

The screenshot shows the 'Bookings / Find Workers' interface. At the top right, the user is identified as 'David Jones' with the role 'Department Coordinator'. The main area displays 'Booking Ref: 209029' and 'Date: 24/05/2022 09:00 - 13:00'. A blue banner 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-hand side, there is a 'Filter' panel. The 'Filter' button at the top of this panel is highlighted with a red rectangular box. Below the button, the panel includes a 'Sort by' dropdown set to 'select' and 'Asc', and several filter options: 'Availability' (checkbox), 'Preferences' (checkbox), 'First Name' (text input), 'Last Name' (text input), 'Valid DBS?' (dropdown set to 'None'), 'Exclude Rejected?' (checkbox), '48hrs opt out?' (checkbox), 'Year of Study' (dropdown set to 'None Selected'), 'My department pool only' (checkbox, checked), 'Student Type' (dropdown set to 'None Selected'), 'Language' (dropdown set to 'None Selected'), 'Distance (in miles):' (text input), 'Department Name' (text input), 'Qualification Name OR Course Title' (text input), 'Employment' (text input), and 'Previously booked for same job title?' (checkbox).

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 9

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 displays 'Booking Ref: 209029' and 'Date: 24/05/2022 09:00 - 13:00'. Below this, a message states 'You may select 1 worker for this booking.' A table lists two workers:

| 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 | £80.05 | No |
| <input checked="" type="checkbox"/> | Walter Strike | Profile Availability | | 00:00 | 48:00 | £80.05 | No |

Below the table, it says 'Displaying 2 items'. At the bottom left, there are three buttons: 'Book Workers' (highlighted with a red box), 'Cancel Booking', and 'Edit Booking'. To the right of the 'Book Workers' button is a 'Schedule for later' input field. On the right side of the interface, there is a 'Filter' panel with options for 'Sort by', 'Availability', 'Preferences', 'First Name', 'Last Name', 'Valid DBS?', 'Exclude Rejected?', '48hrs opt out?', and 'Year of Study'.

The calendar booking will now be green, indicating that a worker has been assigned to the booking.

The screenshot shows the 'Department of Veterinary Medicine Bookings' calendar. At the top, it displays 'Workers have been sent an email'. Below this, there are navigation buttons: 'Department of Veterinary Medicine' with a 'Go' button, 'Create a Booking', 'Draw Down', and 'Booking'. The calendar is for the week of May 23 - 29, 2022. The days of the week are: Mon 23/5, Tue 24/5, Wed 25/5, Thu 26/5, Fri 27/5, Sat 28/5, and Sun 29/5. The time slots are: all-day, 8:30am, 9am, 9:30am, 10am, 10:30am, 11am, 11:30am, 12pm, 12:30pm, and 1pm. A green booking is shown for Tuesday, May 24th, from 9:00 AM to 1:00 PM, with the text '209029 - Lecturer Booking - Department of Veterinary Medicine'.

A yellow message will be displayed at the top, stating an email has been sent to the worker.

You can also view your bookings in **List View** by selecting **List View** from the left-hand menu.

The screenshot displays the 'Bookings List' interface for the University of Cambridge. The left-hand menu is visible, with 'List View' selected. The main content area shows search filters for Booking Title, Booking Date, and Creator Name. Below the filters is a table with one booking entry. The 'Status' column of the table has a green 'Accepted Full' button highlighted with a red box, and a tooltip shows 'Confirmed workers: Walter Strike'.

| Booking Title | Ref | Booking Mode | Booking Type | Booking Date | Start Time | End Time | Contact | Department | Status | Creator | Last Modified |
|------------------|--------|--------------|----------------|--------------|------------|----------|---------|-----------------------------------|---------------|-------------|---------------------|
| Lecturer Booking | 209029 | Standard | Direct Booking | 24/05/2022 | 09:00 | 13:00 | | Department of Veterinary Medicine | Accepted Full | David Jones | 19/05/2022 15:47:45 |

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