DASHBOARD USER GUIDE SCENARIO 1

UNIVERSITY OF CAMBRIDGE
Information Services

DASHBOARD TECHNOLOGY

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.

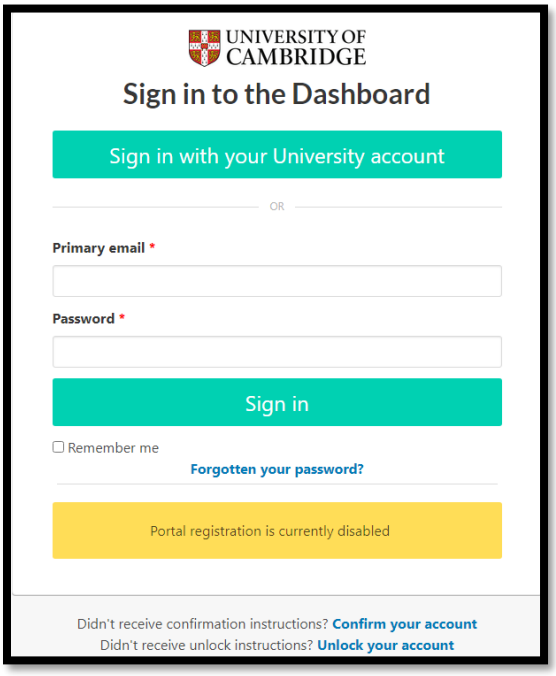
The **Direct Booking with Fixed Hours** type of booking is used when the following criteria exists:

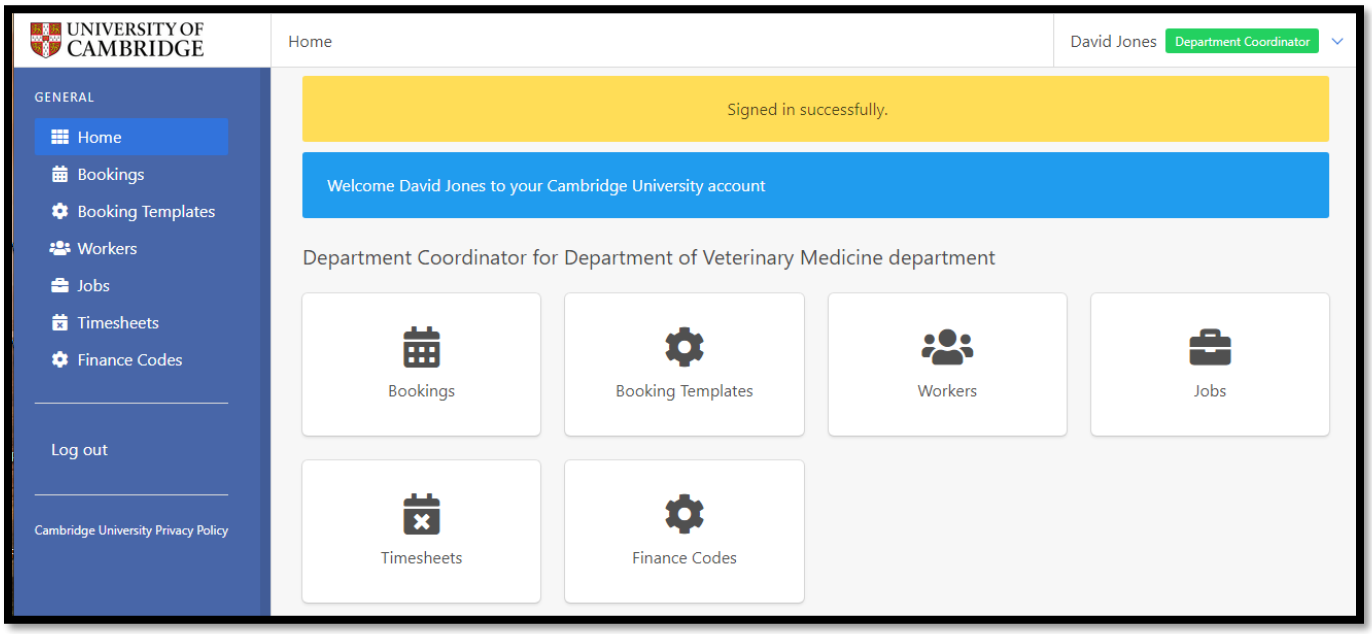
1. You have a specific worker in mind who you wish to employ.
2. The worker booking is for a set number of hours, at a specific time, on a specific day.

Step 1

Sign into the UAT Dashboard using your Department Coordinator account.

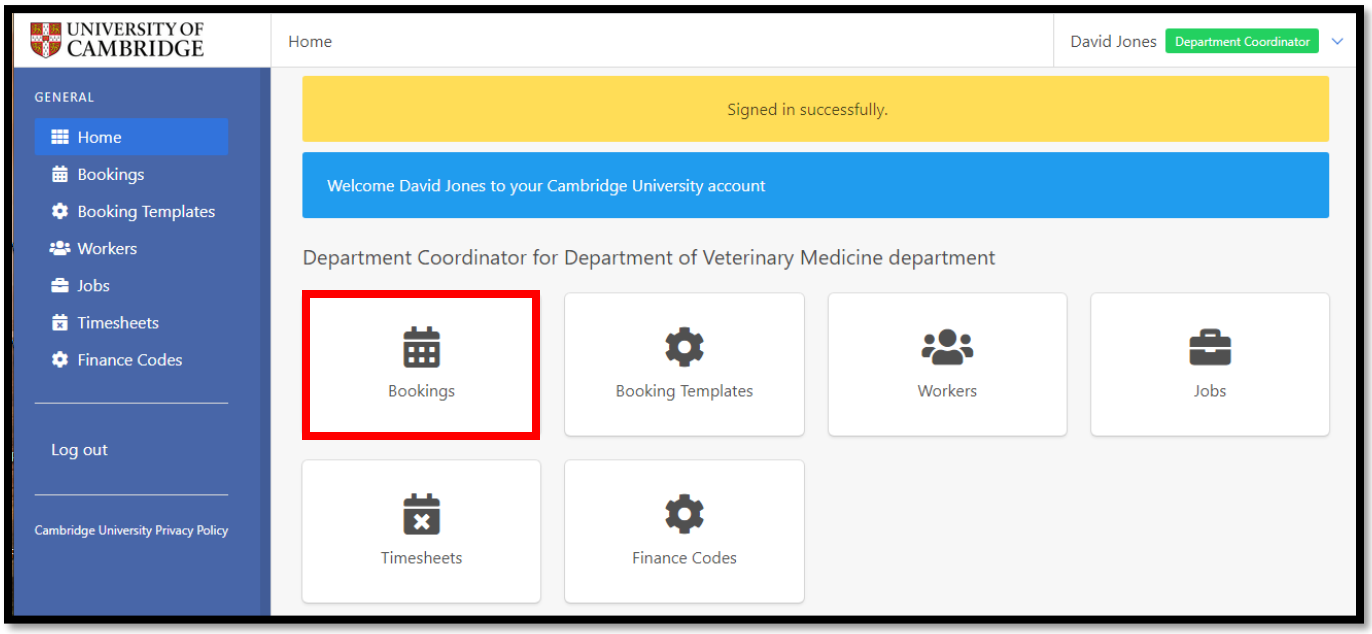
https://cambridgetest.demodashboardtechnology.co.uk





Step 2

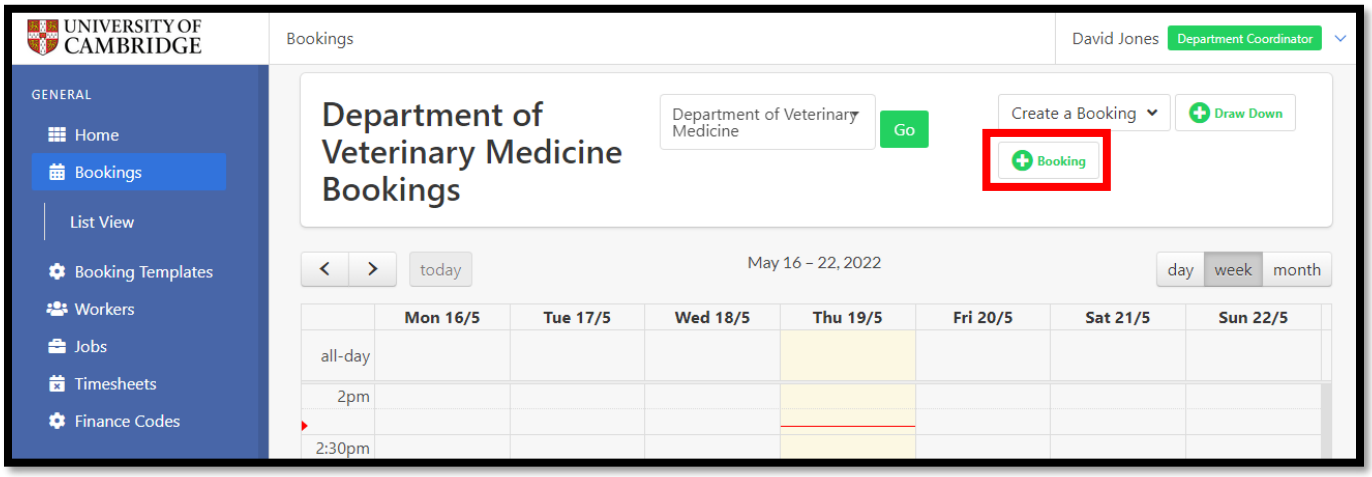
Select the **Bookings** button.



Step 3

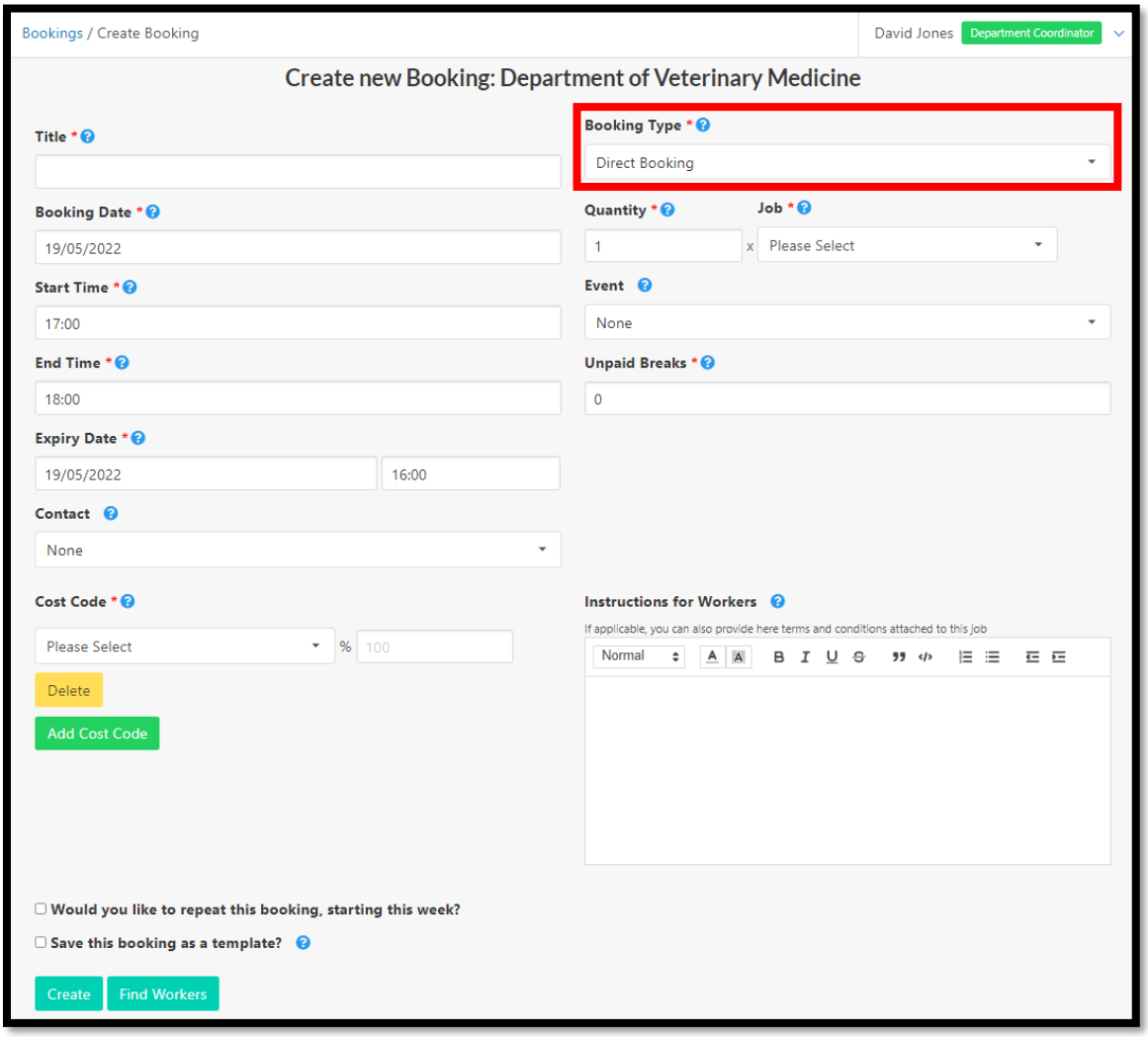
Our first step is to create the Booking itself. Once we have down this, we will then assign a worker to the booking.

On the **Bookings** page select the green +Booking button.



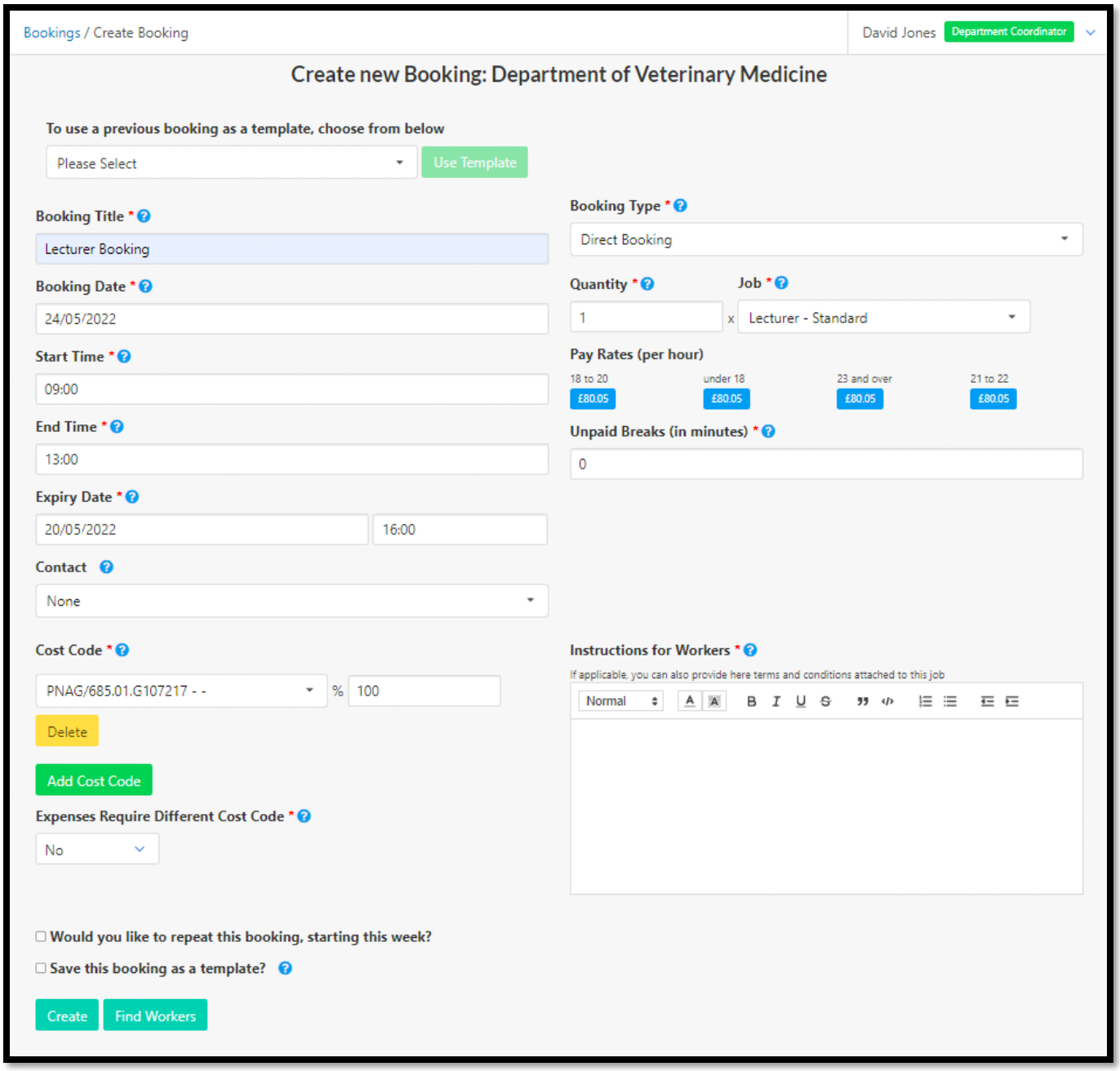
Step 4

On the **Create 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.

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.

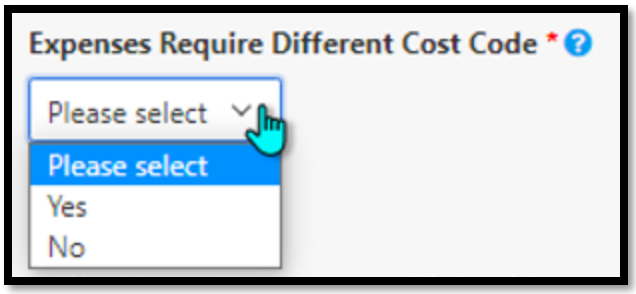
Note! It is possible to split a booking into multiple cost codes (up to five different codes) adding the percentage each cost code will pay. The total must add up to 100%.

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.



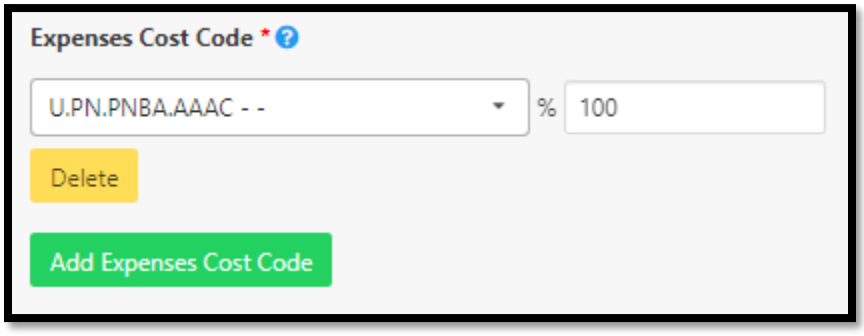
If **No** is chosen, then any expenses claimed by the worker will be paid for using the Cost Code from above.

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.



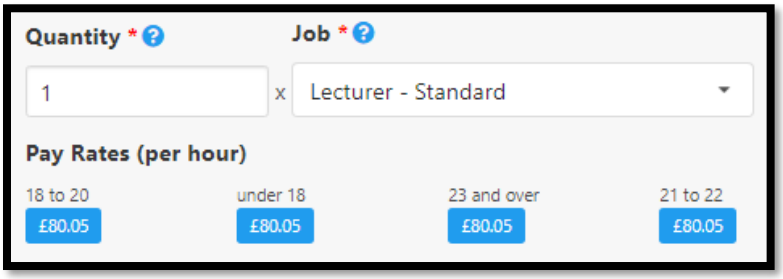
Quantity

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.

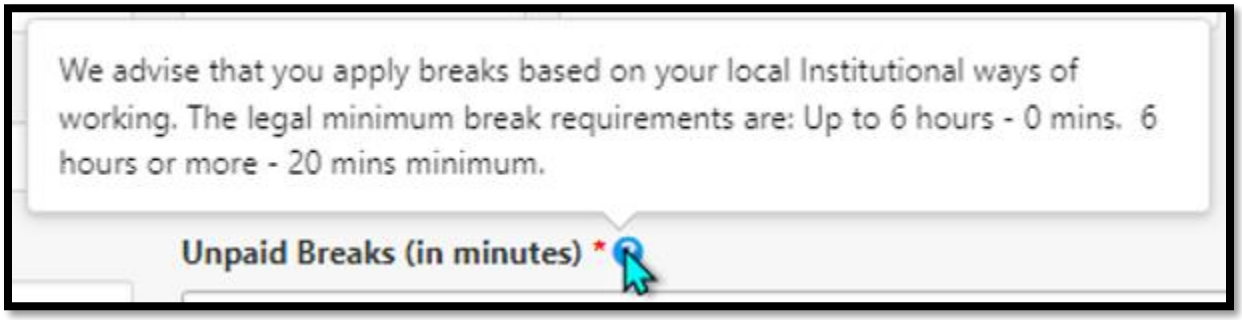


Event

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.



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

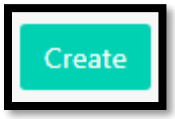
It is possible to set up a repeat booking by checking this tick box. An example of this would be if you require the Lecturer every Tuesday from 09:00 to 13:00 for 4 weeks.

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

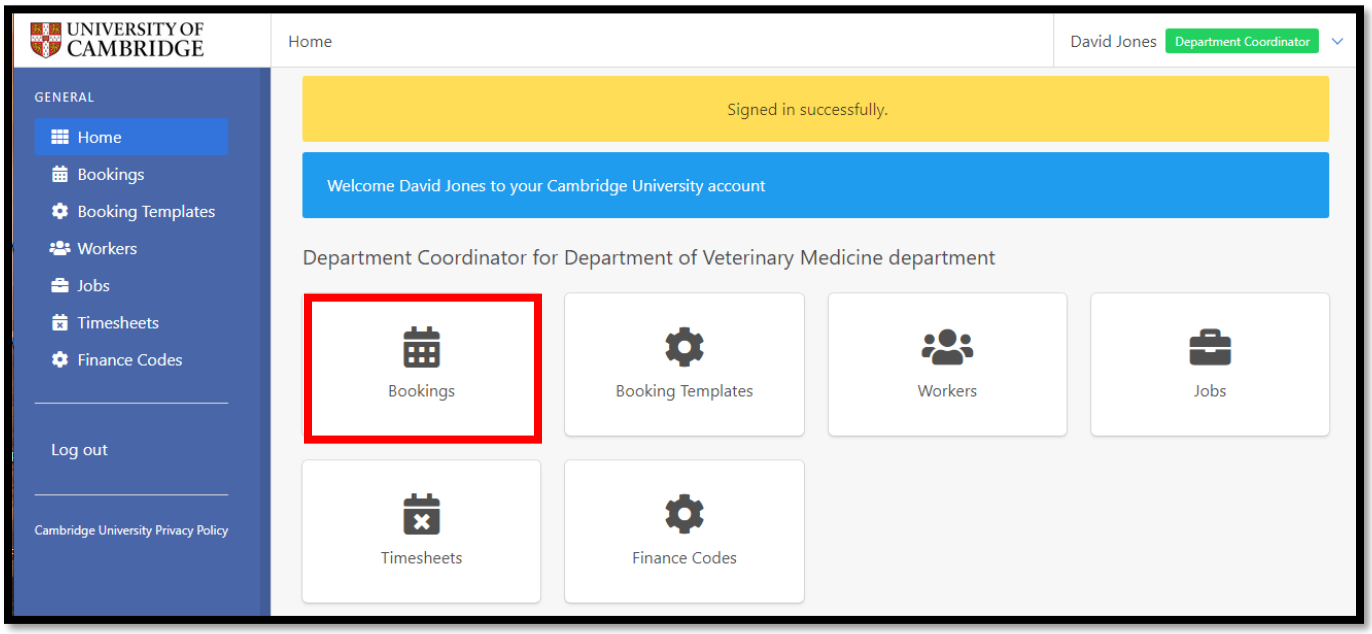
Lastly press the green **Create** button.



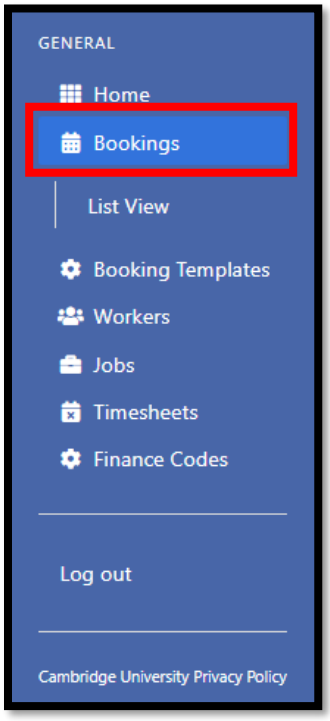
Step 6

Assigning a worker to the booking.

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

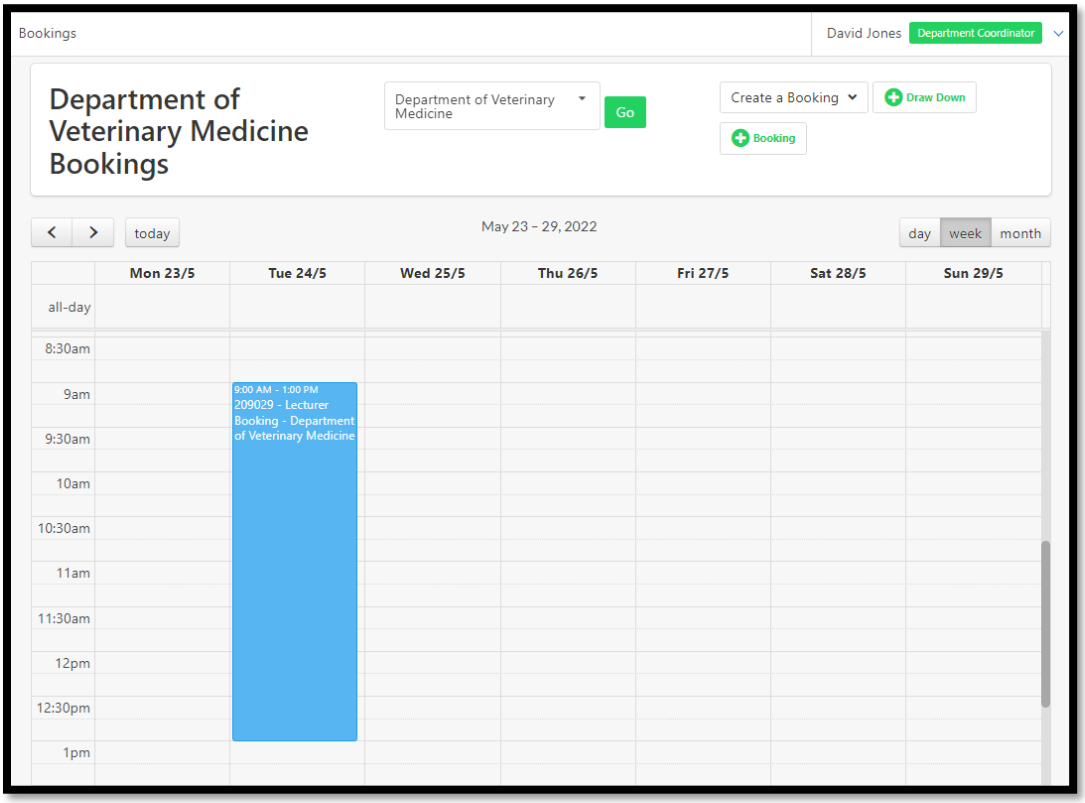


Or by selecting the Bookings page from the left-hand menu.



Step 7

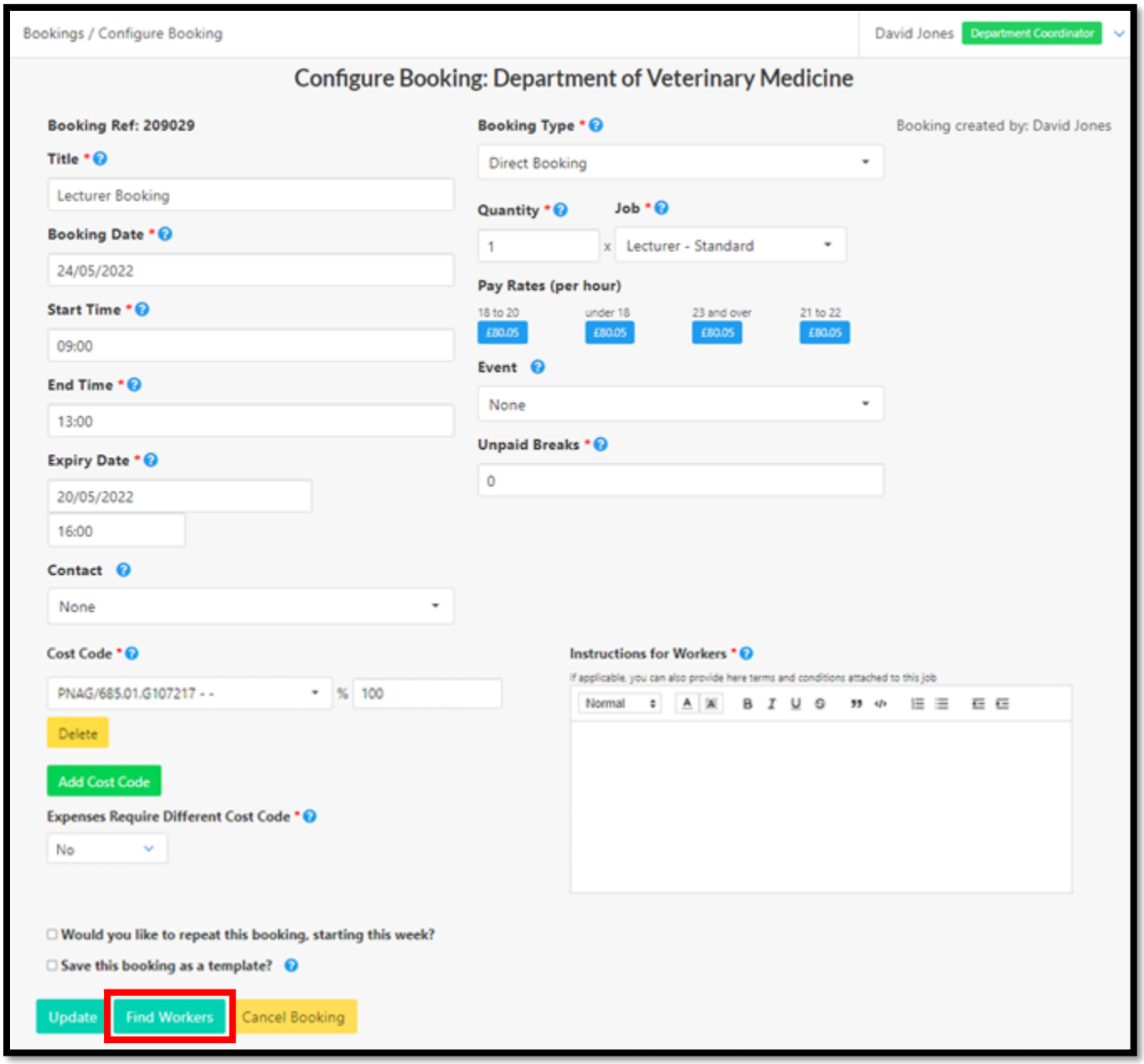
Locate your booking in the calendar.



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

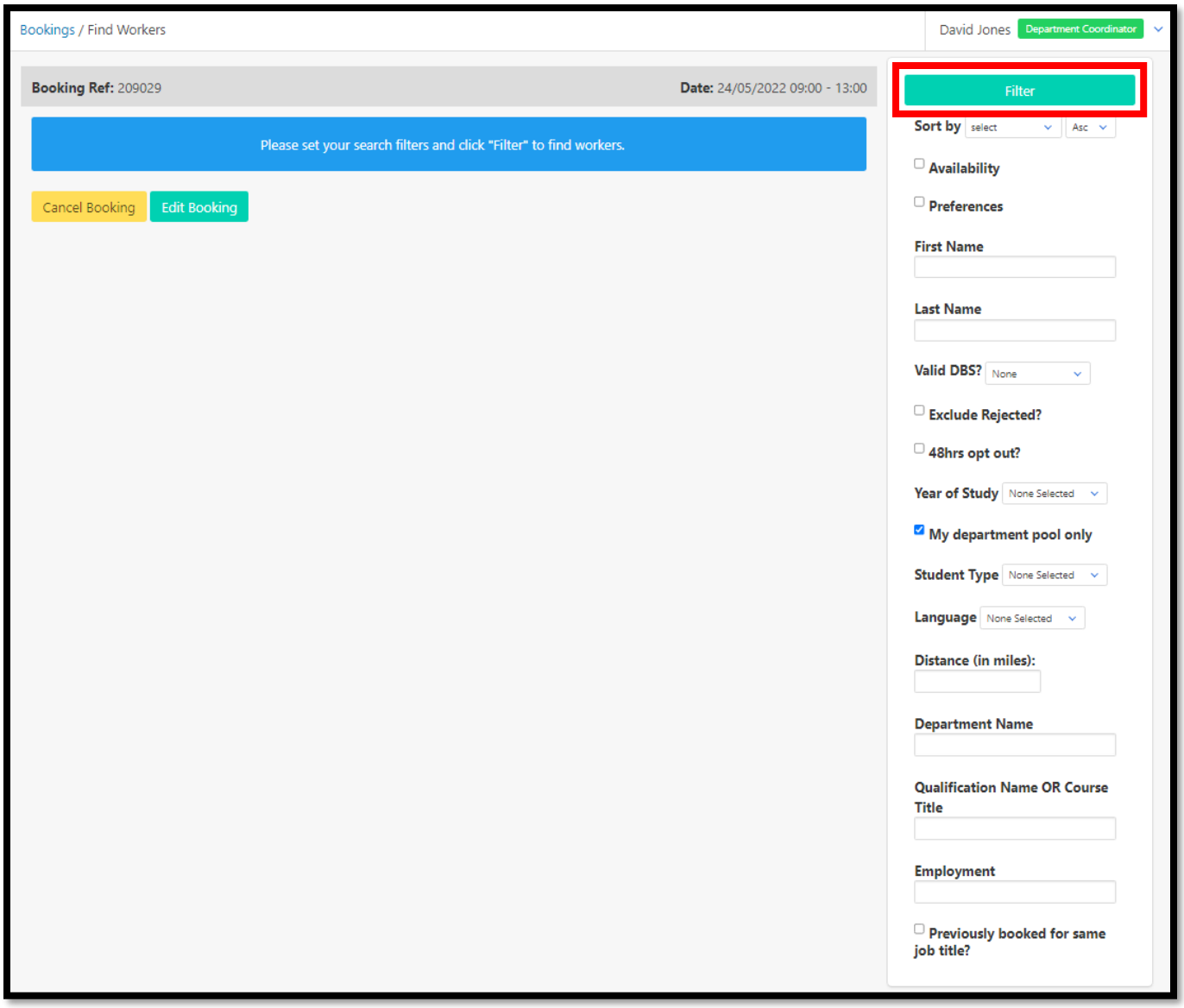
Click on the booking to open it.

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



Step 8

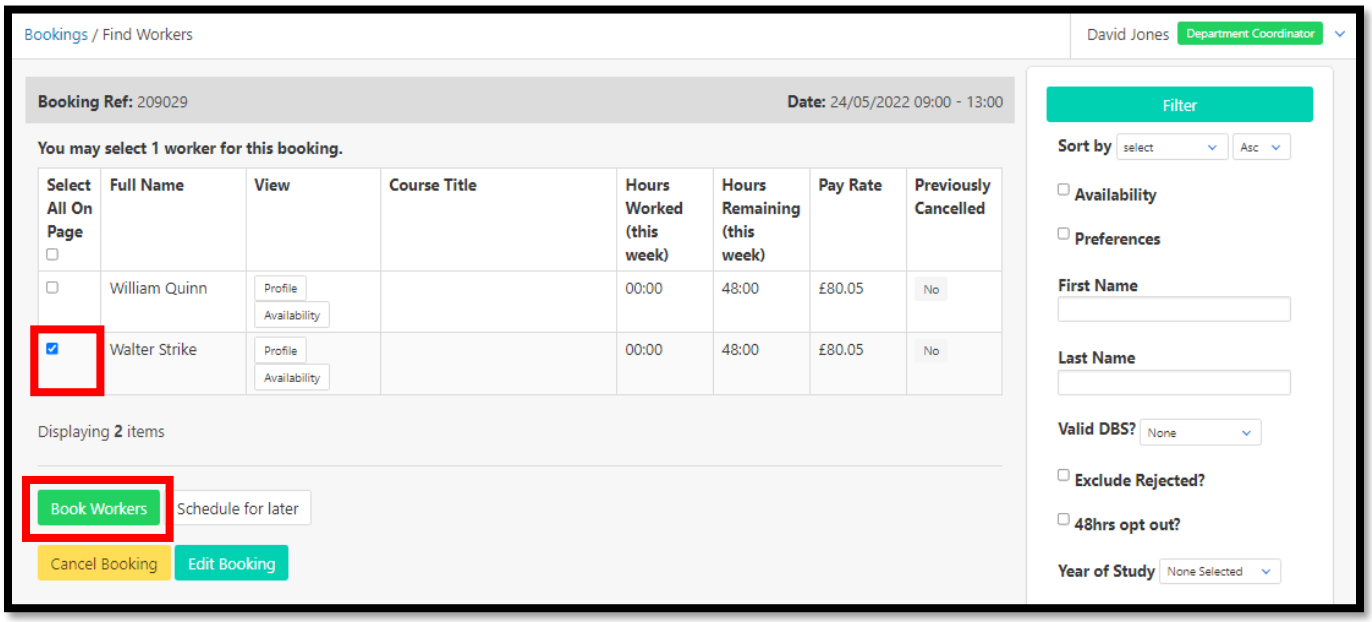
On the **Find Workers** page select the **Filter** button at the top of the right-hand panel.



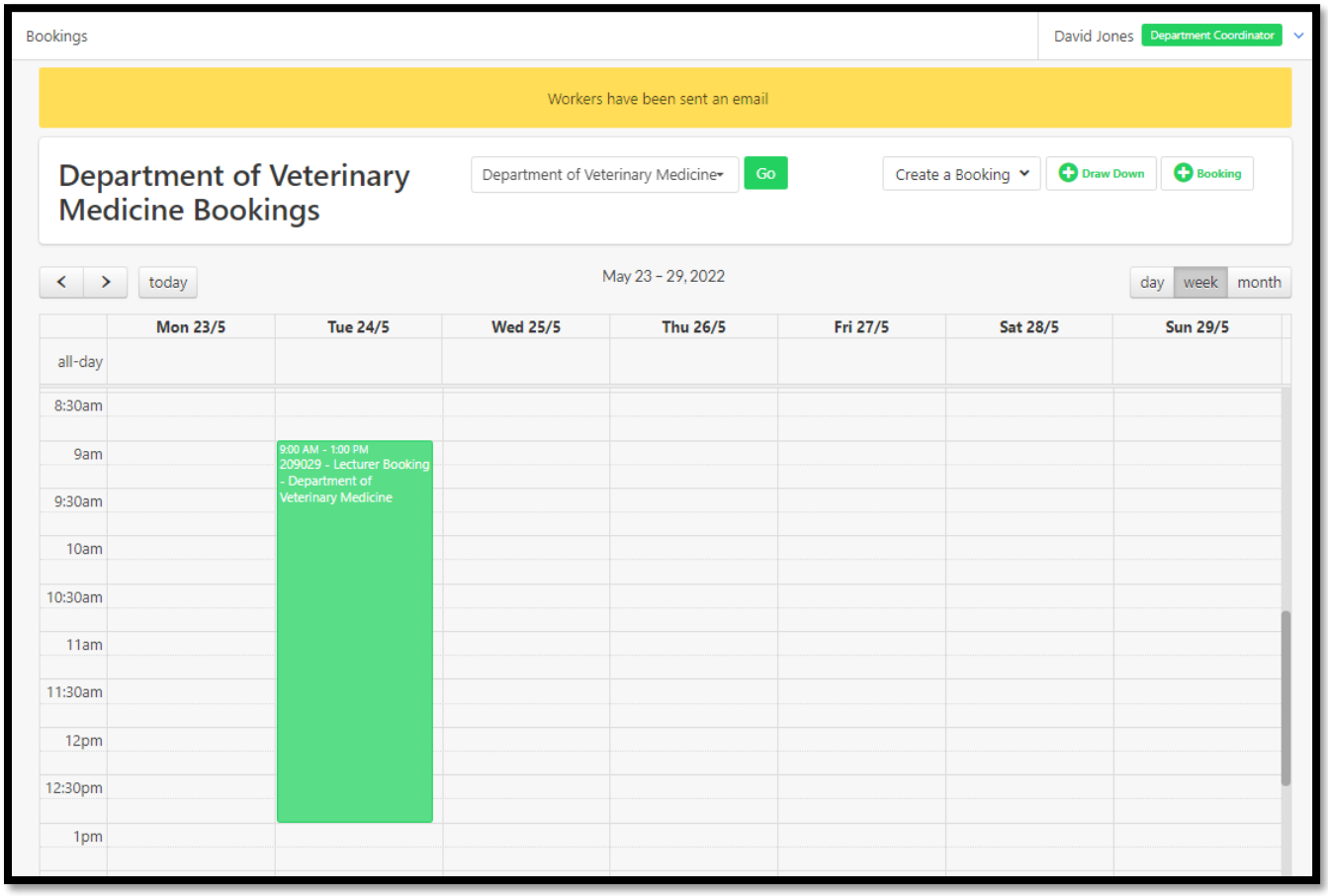
Note! Although the Filter panel allows you to filter workers on various criteria, you can simply press the **Filter** button to list all workers available in your department.

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**.**

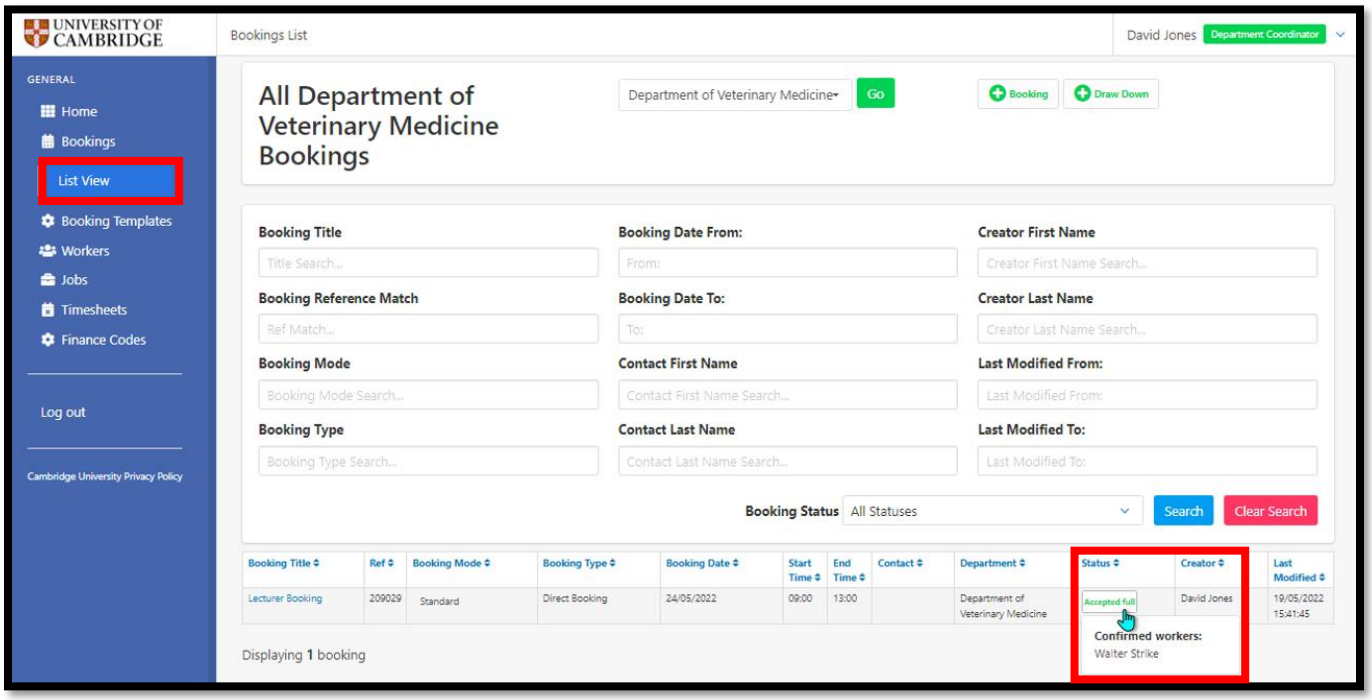


The calendar booking will now be green, indicating that a worker has been assigned to the booking.



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.



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