DASHBOARD USER GUIDE SCENARIO 6





SCENARIO 6

1ST ACCEPT, 1ST BOOK DRAW DOWN

Scenario Introduction and Description

The Department Coordinator wants to create a booking for a Demonstrator Payrate of £13.81 (hourly rate) for the whole Term (8 weeks). The demonstration days and times vary each week. In weeks 1,3,5,7 they are on Tuesday from 09.00 - 13.00 and in weeks 2,4,6,8 they are on Thursday from 13.00 - 17.00. The worker will work 4 hours per week for 8 weeks.

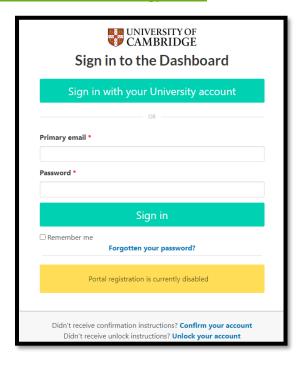
The Department Coordinator has a number of PhD students registered as workers on Dashboard who they want to advertise the role to. They don't mind who accepts the role and are happy for the first worker to accept it to take the booking.

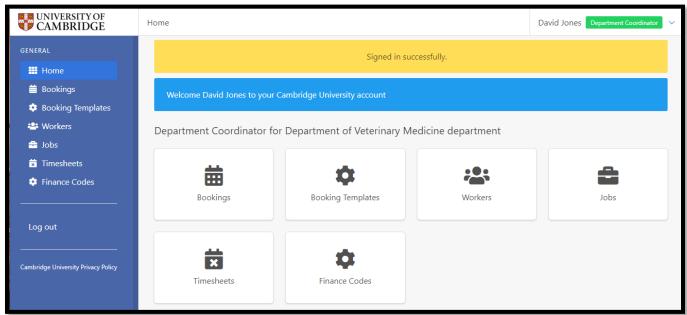
The **1st Accept**, **1**st **Book Draw Down** type of booking is used when the following criteria exists:

- You require either one worker or multiple workers for the same job, and you need to fill
 the positions quickly. You will send your job request out to a specific number of workers
 from your pool of workers. The first worker(s) to accept the job and register their interest
 will be booked to do the job.
- 2. The worker job booking is for a total number of hours to be worked during the week, but the times vary.

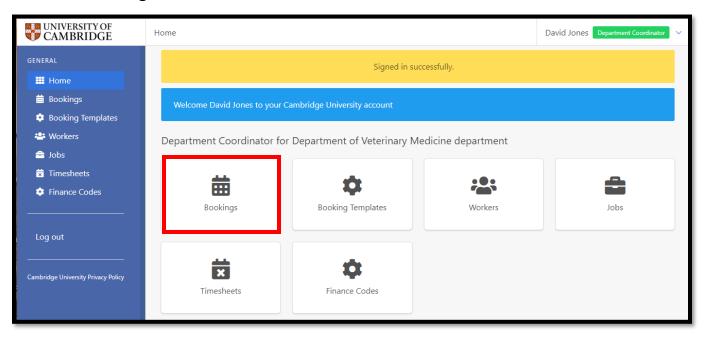
Sign into the UAT Dashboard using your Department Coordinator account.

https://cambridgetest.demodashboardtechnology.co.uk





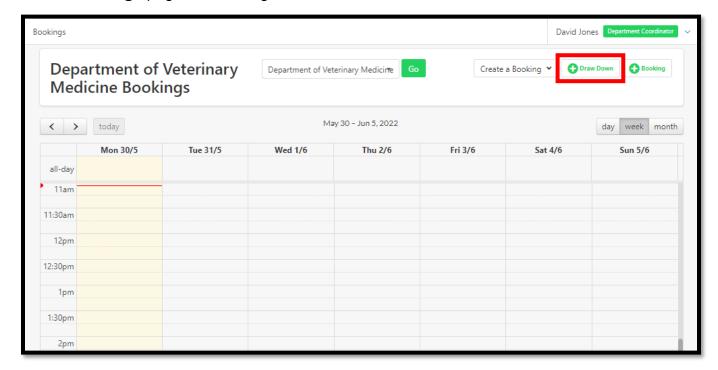
Select the **Bookings** button.



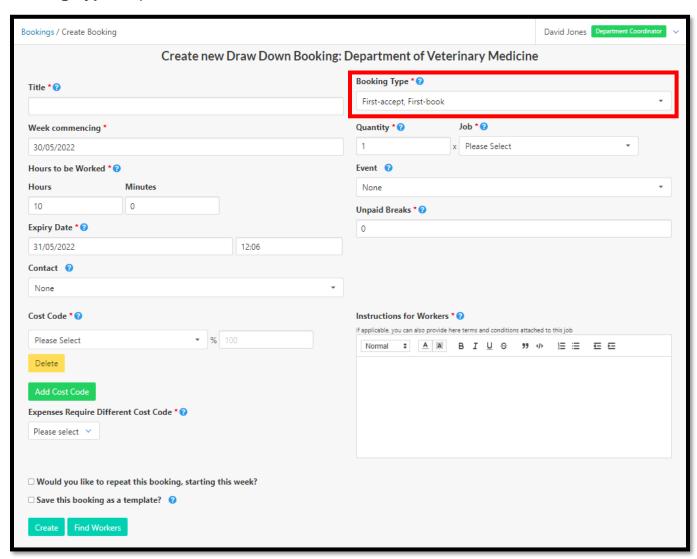
Step 3

Our first step is to create the Booking itself. Once we have down this, it will be advertised to our pool of workers. The workers will receive an email, and the first one to accept the job booking will be booked.

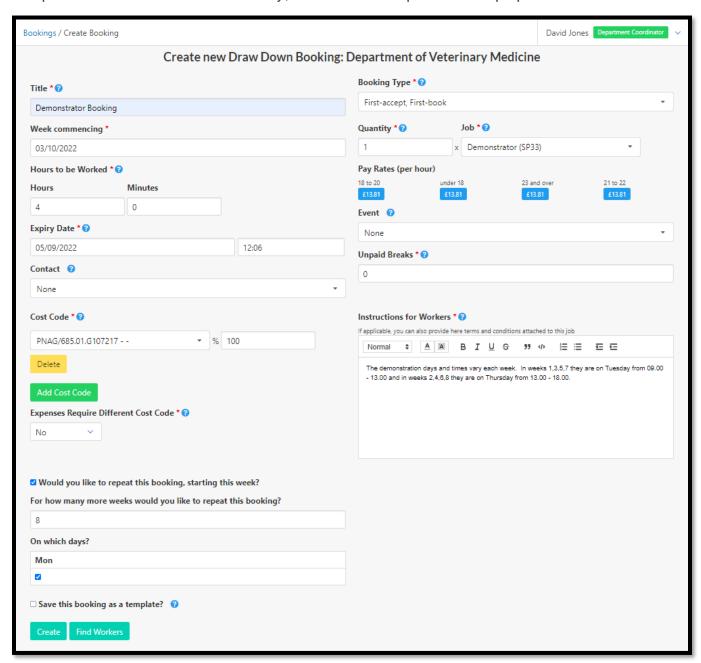
On the **Bookings** page select the green **+Draw Down** button.



On the **Create new Draw Down Booking** page, choose **First-accept, First-book** from the **Booking Type** drop down menu.



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 (weeks always start on a Monday), 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 workers. If the worker or workers you have chosen have not responded by this date and time, then you need to find other workers 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

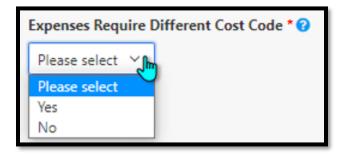
Enter the appropriate cost code and percentage for this booking. In other words, how is it being paid for or who is paying for the work.

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.



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 we need 1 worker.

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**.

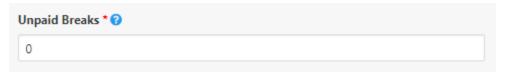
Unpaid Breaks

A worker is allowed a 20-minute (minimum) break after 6 hours of work. Our worker will only be working a 4 hour shift.

For more information, hover over the help tip icon.



In this case, 0 (the number of minutes) is entered in this field.

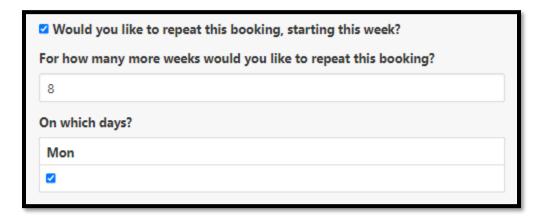


Instructions for Worker

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 we need to repeat this booking for 8 weeks, therefore we need to tick this box and enter 8 as the number of 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.



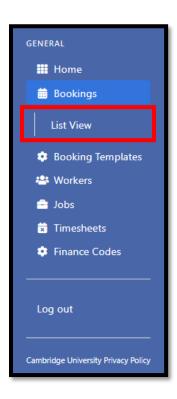
Creating the booking

Lastly press the green Create button.



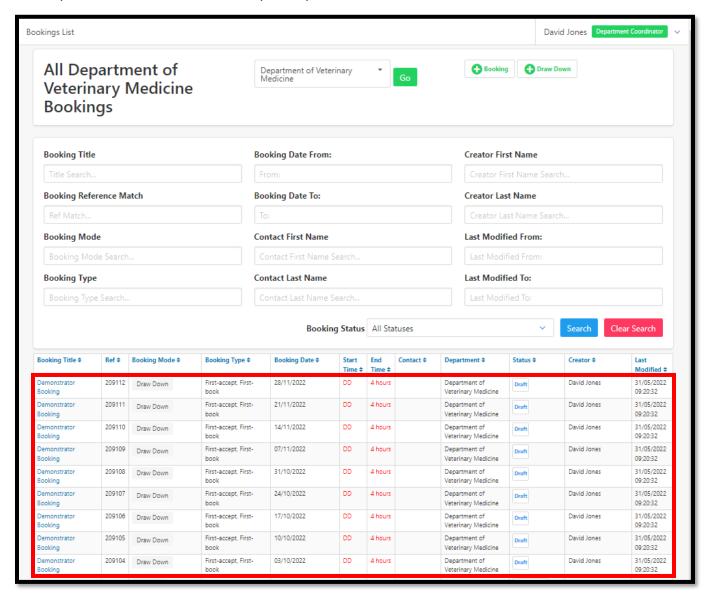
Finding your workers.

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.



Locate your bookings in the Bookings List.

Filter options are available at the top if required.



The Start Time and End Time columns will be coloured red, indicating this is a Draw Down booking.

The Status column will be marked as Draft, indicating that workers have yet to be assigned.

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.

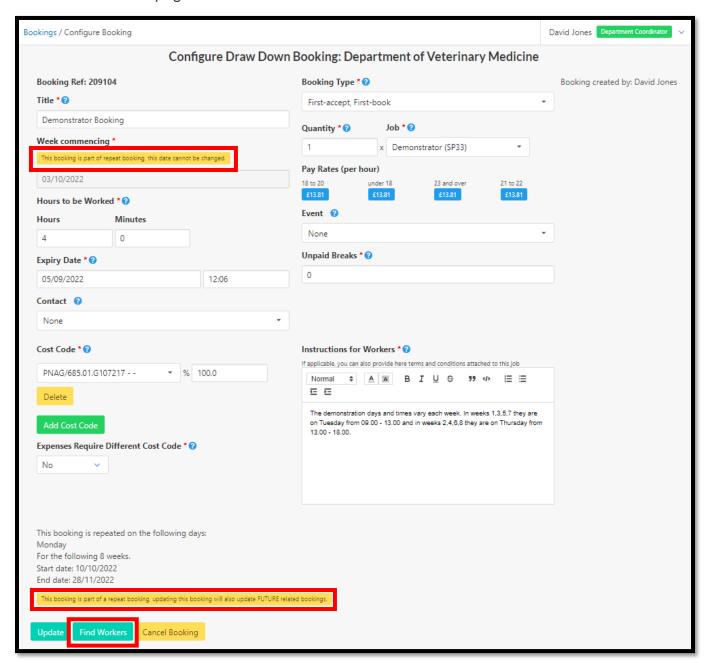
Booking Title \$	Ref	Booking Mode	Booking Type	Booking Date	Start Time \$	End Time \$
Demonstrator Booking	209112	Draw Down	First-accept First- book	28/11/2022	DD	4 hours
Demonstrator Booking	209111	Draw Down	First-accept, First- book	21/11/2022	DD	4 hours
Demonstrator Booking	209110	Draw Down	First-accept, First- book	14/11/2022	DD	4 hours
Demonstrator Booking	209109	Draw Down	First-accept, First- book	07/11/2022	DD	4 hours
Demonstrator Booking	209108	Draw Down	First-accept, First- book	31/10/2022	DD	4 hours
Demonstrator Booking	209107	Draw Down	First-accept, First- book	24/10/2022	DO	4 hours
Demonstrator Booking	209106	Draw Down	First-accept, First- book	17/10/2022	DD	4 hours
Demonstrator Booking	209105	Draw Down	First-accept, First- book	10/10/2022	DD	4 hours
Demonstrator Booking	209104	Draw Down	First-accept, First- book	03/10/2022	DD	4 hours

Here we have sorted by date order, with the first week on top. Locate the first booking in the series in terms of the first start date in the **Bookings List** and click on the Booking Title to open it.

Demonstrator Booking	209104	Draw Down	First-accept, First- book	03/10/2022	DD	4 hours
Demonstrator Booking	209105	Draw Down	First-accept, First- book	10/10/2022	DD	4 hours
Demonstrator Booking	209106	Draw Down	First-accept, First- book	17/10/2022	DD	4 hours
Demonstrator Booking	209107	Draw Down	First-accept, First- book	24/10/2022	DD	4 hours
Demonstrator Booking	209108	Draw Down	First-accept, First- book	31/10/2022	DD	4 hours
Demonstrator Booking	209109	Draw Down	First-accept, First- book	07/11/2022	DD	4 hours
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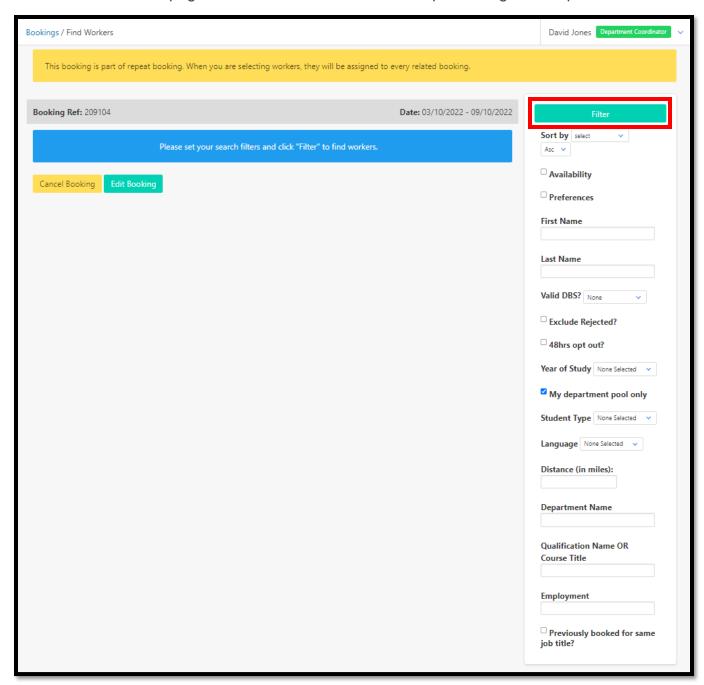
The **Configure Draw Down Booking** page will have a couple of yellow warning messages indicating that 'This is part of a repeat booking and the date cannot be changed'. Also, any other changes will also update all future related bookings.

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



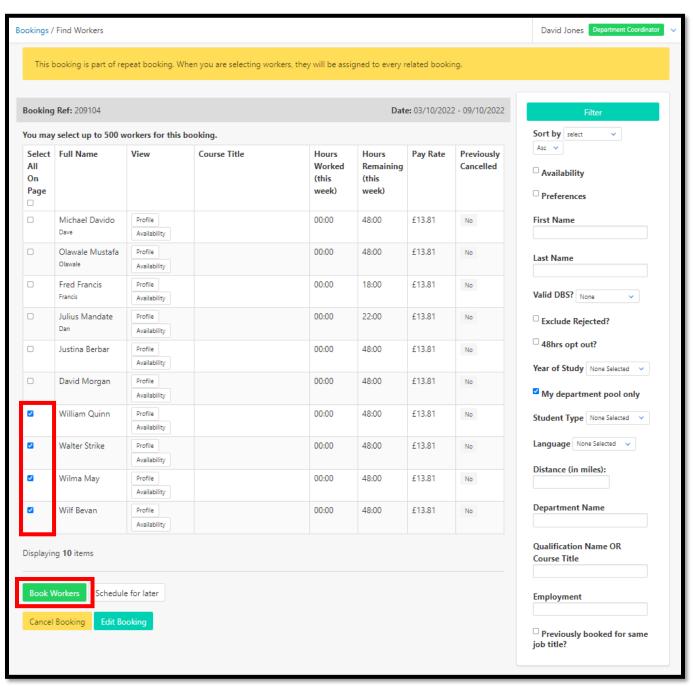
This page will have a yellow warning message at the top indicating that worker(s) assigned to this booking will also be assigned to every other related booking.

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

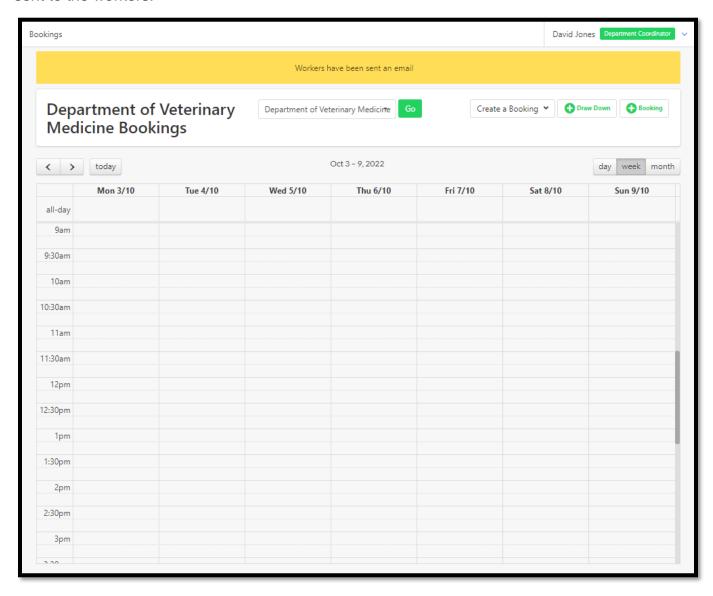


Note! Although the Filter panel allows you to filter workers on various criteria, you can simply press the **Filter** button to list all workers available in your department.

Your workers will now be listed. Tick the box to the left of the names of the workers you wish to advertise the job to. Then press the green **Book Workers** button.



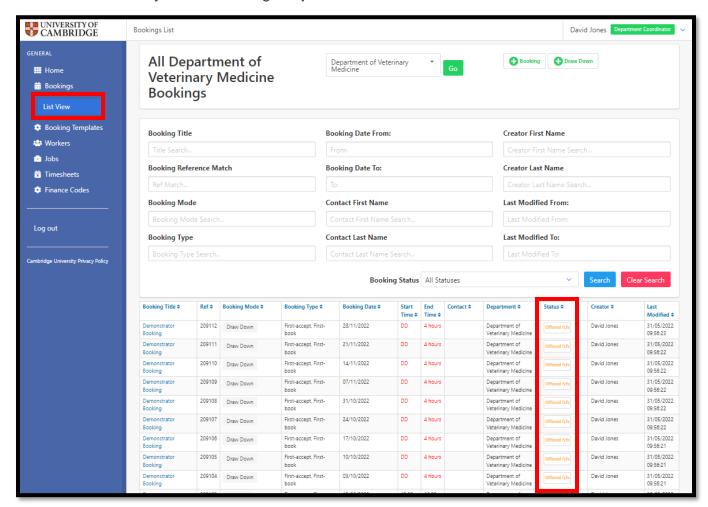
The screen will return to the calendar view. Although you won't see your booking here as it's a Draw Down booking, a yellow message will be displayed at the top stating an email has been sent to the workers.



To view your booking, select List View from the left-hand menu.

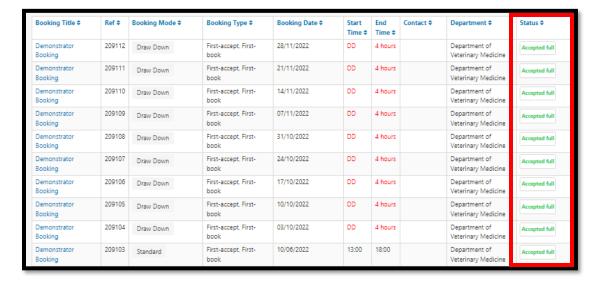


Notice the Status is yellow indicating the job has been offered.



Step 10

As soon as the first worker has accepted your job booking, the list entry status column will turn green, indicating that the job has been filled.

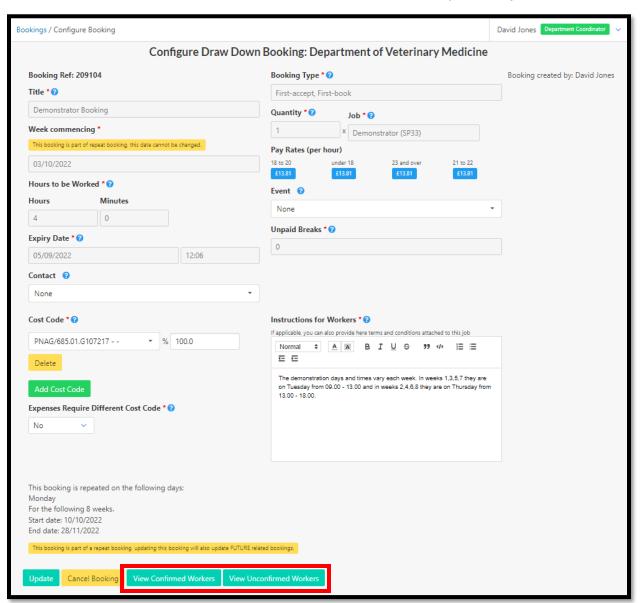


You can see which worker has accepted the job by hovering over the green **Accepted Full** button in the **Status** column at the right-hand end of the booking. This will show the names of the workers now assigned to the Job Booking.

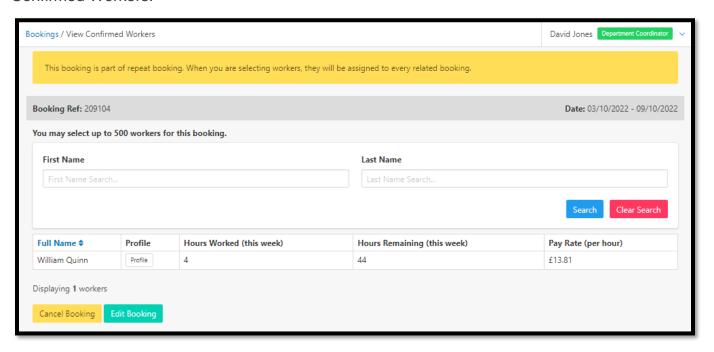


Alternatively, you can click on the Booking Title to open it.

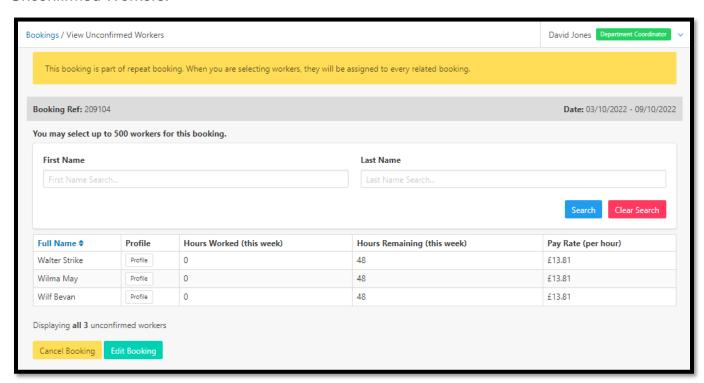
From here you can select the **View Confirmed Workers** button or **View Unconfirmed Workers** button to view the workers who have and have not accepted the job.



Confirmed Workers:



Unconfirmed Workers:



Finish