DASHBOARD USER GUIDE SCENARIO 5



UNIVERSITY OF

# **SCENARIO 5**

# 1ST ACCEPT, 1ST BOOK WITH FIXED HOURS

### Scenario Introduction and Description

The Department Coordinator wants to create a booking for FOUR Demonstrators with a Payrate of £13.81 (hourly rate), on Friday from 13.00 - 18.00.

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 FOUR workers to accept it to take the booking.

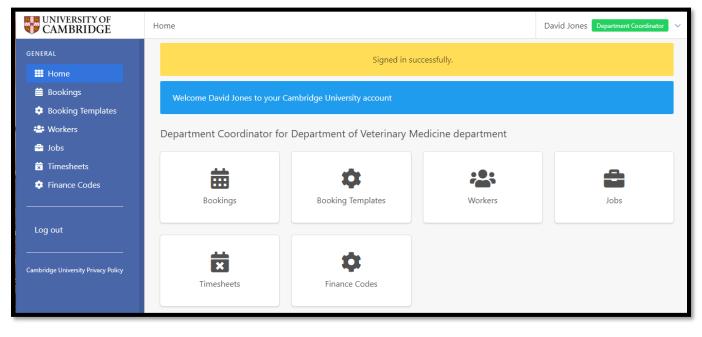
The **1st Accept**, **1**<sup>st</sup> **Book with Fixed Hours** type of booking is used when the following criteria exists:

- 1. 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 workers who accept the job and register their interest will be booked to do the job.
- 2. The worker booking is for a fixed number of hours, starting at a specific time on a specific day.

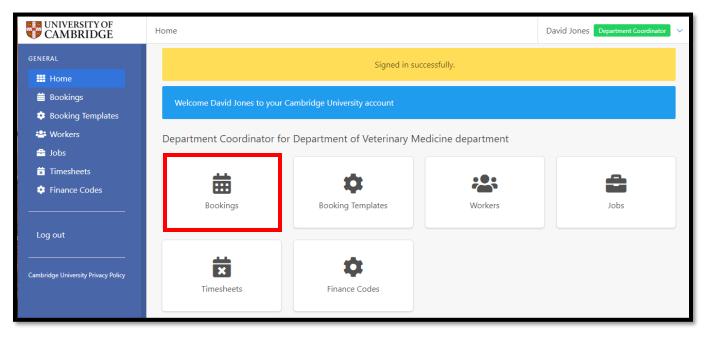
Sign into the UAT Dashboard using your Department Coordinator account.

https://cambridgetest.demodashboardtechnology.co.uk

Sign in to the Dashboard	
Sign in with your University account	
OR	
rimary email *	
assword *	
Sign in	
Remember me Forgotten your password?	
Portal registration is currently disabled	



### 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 ones to accept the job booking will be booked.

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

Bookings						David Jone	Department Coordinator		
Dep Med	artment of V licine Booki	Veterinary ngs	Department of Veterinary Medicine Go Create a Booking 🗸 🕒 Draw Down						
< >	today		May	/ 30 – Jun 5, 2022			day week month		
	Mon 30/5	Tue 31/5	Wed 1/6	Thu 2/6	Fri 3/6	Sat 4/6	Sun 5/6		
all-day									
11am									
11:30am									
12pm									
12:30pm									
1pm									
1:30pm									
2pm									

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

Bookings / Create Booking	David Jones Department Coordinator
Create new Booking: Depar	tment of Veterinary Medicine
To use a previous booking as a template, choose from below	
Please Select   Use Template	
Title * 😧	Booking Type * 😧
	First-accept, First-book 🔹
Booking Date * 🕢	Quantity * 🚱 Job * 🚱
30/05/2022	1 x Please Select *
Start Time * 😧	Event 😮
14:00	None 👻
End Time * 😧	Unpaid Breaks * 🕜
15:00	0
Expiry Date * 🕢	
30/05/2022 13:00	
Contact 😧	
None	
Cost Code * 🕑	Instructions for Workers * 😧
Please Select • % 100	If applicable, you can also provide here terms and conditions attached to this job       Normal       ♦       ▲       ▲       B     I       U     S       99     4P       E     E
Delete	
Add Cost Code	
Expenses Require Different Cost Code * 😧	
Please select 💙	
□ Would you like to repeat this booking, starting this week?	
□ Save this booking as a template? 🔞	
Create Find Workers	

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

Bookings / Create Booking	David Jones Department Coordinator 🗸
Create new Booking: Depart	ment of Veterinary Medicine
To use a previous booking as a template, choose from below	
Please Select   Use Template	
Title * 🕖	Booking Type * 😧
Demonstrator Booking	First-accept, First-book *
Booking Date * 😧	Quantity *? Job *?
10/06/2022	4 x Demonstrator (SP33) *
Start Time * 🕖	Pay Rates (per hour)
13:00	18 to 20         under 18         23 and over         21 to 22           £13.81         £13.81         £13.81         £13.81
End Time * 😮	Event 🔞
18:00	None
Expiry Date * 😧	Unpaid Breaks * 😯
03/06/2022 13:00	1
Contact 🔞	
None *	
Cost Code * 😧	Instructions for Workers * 😧
PNAG/685.01.G107217 * % 100	If applicable, you can also provide here terms and conditions attached to this job           Normal         ♦         ▲         ₩         B         I         U         ♥         ₱         40         IE         IE<
Delete	
Add Cost Code	
Expenses Require Different Cost Code * 🕑	
□ 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 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**

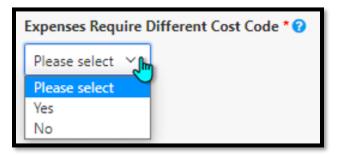
Enter the appropriate cost code and percentage for this booking. In other words, how is it being paid for or who is paying for the work.

**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.

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 we need 4 workers.

#### 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 <u>casual.workers@admin.cam.ac.uk</u> and ask them to add the new role details.

Quantity * 😮	Job * 😯		
4	x Demon	strator (SP33)	•
Pay Rates (per l	nour)		
18 to 20 £13.81	under 18 £13.81	23 and over £13.81	21 to 22 £13.81

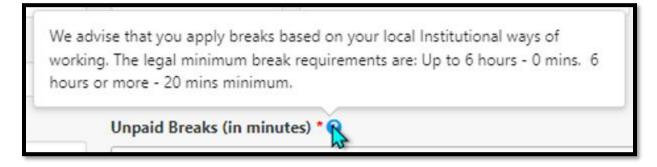
#### Event

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 workers will be working for 5 hours therefore 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 Bar Staff for three days a week 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.

### **Creating the booking**

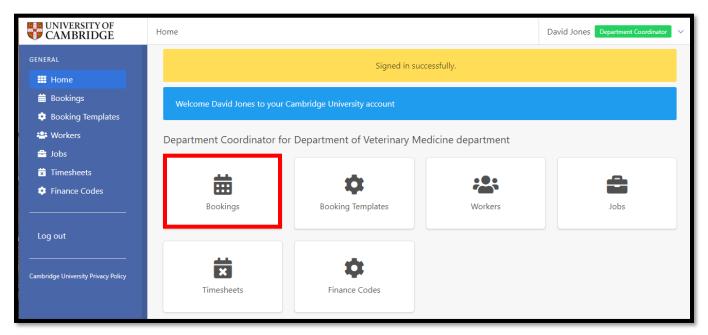
Lastly press the green **Create** button.



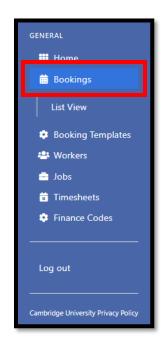
# Step 6

Finding your workers.

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.

Depa Medi	rtment of cine Booki	Veterinary ngs	Department of Veterinary Medicine Go Create a Booking 👻 🕒 Draw Down					
< >	today		ال	un 6 - 12, 2022			day week month	
	Mon 6/6	Tue 7/6	Wed 8/6	Thu 9/6	Fri 10/6	Sat 11/6	Sun 12/6	
all-day								
12:30pm								
1pm					1:00 PM - 6:00 PM 209103 - Demonstrator			
1:30pm					Booking - Department of Veterinary Medicine			
2pm								
2:30pm								
3pm								
3:30pm								
4pm								
4:30pm								
5pm								
5:30pm								

It will be coloured blue, indicating that workers have yet to be assigned to the booking. Click on the booking to open it.

	Configure E	Booking: Department of Veterinary Medicine	
Booking Ref: 209103		Booking Type * 🕢	Booking created by: David Jone
Title * 😧		First-accept, First-book	*
Demonstrator Booking		Quantity * 🕡 Job * 🕢	
Booking Date * 🛛		4 x Demonstrator (SP33) +	
10/06/2022		Pay Rates (per hour)	
Start Time * 😧		18 to 20 under 18 23 and over 21 to 22	
13:00		Event ()	
End Time " 😧		None	
18:00			(1)
Expiry Date * 🕜		Unpaid Breaks * 🚱	
03/06/2022	13:00	0	
Contact 😧			
None			
Cost Code * 🔞		Instructions for Workers * 0	
		If applicable, you can also provide here terms and conditions attached to this job	
PNAG/685.01.G107217 - * 3 Delete	100.0	Normal : ▲ M B I U 0 19 40 E Ξ E E	
		We need 4 Demonstrators on Friday from 13.00 - 18.00.	
Add Cost Code			
xpenses Require Different Cost Code *	0		
No 👻			

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

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

Bookings / Find Workers		David Jones Department Coordinator 🗸
Booking Ref: 209103	Date: 10/06/2022 13:00 - 18:00	Filter
Please set your search filters and click "Filter" to find wor	kers.	Sort by select ~
Cancel Booking Edit Booking		□ Availability
		<sup> —</sup> Preferences
		First Name
		Last Name
		Valid DBS? None
		□ Exclude Rejected?
		□ 48hrs opt out?
		Year of Study None Selected 💙
		My department pool only
		Student Type None Selected V
		Language None Selected 🗸
		Distance (in miles):
		Department Name
		Qualification Name OR Course Title
		Employment
		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.

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

Bookings /	Find Workers							David Jones Department Coordinator 🗸
Booking	Ref: 209103				Date	e: 10/06/202	2 13:00 - 18:00	Filter
You may	select up to 500 w	Sort by select						
Select All On Page	Full Name	View	Course Title	Hours Worked (this week)	Hours Remaining (this week)	Pay Rate	Previously Cancelled	Asc V Availability
	Michael Davido <sub>Dave</sub>	Profile Availability		00:00	48:00	£13.81	No	First Name
	Olawale Mustafa <sup>Olawale</sup>	Profile Availability		00:00	48:00	£13.81	No	Last Name
	Fred Francis Francis	Profile Availability		00:00	18:00	£13.81	No	Valid DBS? None ~
	Julius Mandate <sub>Dan</sub>	Profile Availability		00:00	18:00	£13.81	No	Exclude Rejected?
	Justina Berbar	Profile Availability		00:00	48:00	£13.81	No	□ 48hrs opt out? Year of Study None Selected ✓
	David Morgan	Profile Availability		00:00	48:00	£13.81	No	My department pool only
	William Quinn	Profile Availability		00:00	48:00	£13.81	No	Student Type None Selected 💙
	Walter Strike	Profile Availability		10:00	38:00	£13.81	No	Language None Selected  Distance (in miles):
	Wilma May	Profile Availability		00:00	48:00	£13.81	No	Distance (in miles):
	Wilf Bevan	Profile Availability		00:00	48:00	£13.81	No	Department Name
Displayir	ig <b>10</b> items							Qualification Name OR Course Title
		e for later						Employment
Cancel	Booking Edit Bo	poking						Previously booked for same job title?

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

The calendar booking will now be orange, indicating that the job has been offered.

okings						David Jo	Department Coordinator
			Workers ha	ave been sent an email			
Depa Medio	rtment of cine Booki	Veterinary ngs	Department of Vete	erinary Medicin <del>r</del> e Go	Create	a Booking 👻 🕒 D	raw Down Booking
< >	today		ال	un 6 - 12, 2022			day week month
	Mon 6/6	Tue 7/6	Wed 8/6	Thu 9/6	Fri 10/6	Sat 11/6	Sun 12/6
all-day							
2:30pm							
1pm					1:00 PM - 6:00 PM 209103 - Demonstrator Booking - Department of		
:30pm							
2pm							
2:30pm							
3pm							
3:30pm							
4pm							
:30pm							
5pm							
:30pm							
брт							
5:30pm							

You can also view your bookings in **List View** by selecting **List View** from the left-hand menu. Note the Status is yellow indicating the job has been offered.

UNIVERSITY OF CAMBRIDGE	Bookings List									Da	avid Jones Departm	ent Coordinator 🗸 🗸	
GENERAL Home Bookings List View	All Department of Veterinary Medicine Bookings			D	Department of Veterinary Medicine Go Booking Oraw Down								
🌣 Booking Templates	Booking Title				oking Date From:				Creator Fi		me		
Jobs	Title Search			Fr					Creator F	irst Name Sear			
🕱 Timesheets	Booking Reference Match		Boo	Booking Date To:					Creator Last Name				
🔅 Finance Codes	Ref Match			To						Creator Last Name Search Last Modified From:			
	Booking Mode			Сог									
Log out	Booking Mode Search				Contact First Name Search				Last Mod	Last Modified From:			
Log out	Booking Type			Сог	Contact Last Name				Last Modi	Last Modified To:			
Cambridge University Privacy Policy	Booking Type S	Search			ontact Last Name Se	arch			Last Mod	ified To:			
					Booki	ng Statu	IS All S	itatuses		~	Search	ear Search	
	Booking Title \$	Ref \$	Booking Mode \$	Booking Type \$	Booking Date \$	Start Time \$	End Time ¢	Contact \$	Department \$	Status \$	Creator \$	Last Modified \$	
	Demonstrator Booking	209103	Standard	First-accept, First-book	10/06/2022	13:00	18:00		Department of Veterinary Medicine	Offered fcfs	David Jones	30/05/2022 11:50:01	
	Lecturer_Seminar	209045	Standard	Direct Booking	23/05/2022	15:45	16:45		Department of Veterinary Medicine	Draft	Michelle Reeves	23/05/2022 14:45:15	
	Examiner Booking	209039	Draw Down	Direct Booking	25/07/2022	DD	10 hours		Department of Veterinary Medicine	Accepted full	David Jones	20/05/2022 14:21:38	
	Examiner Booking	209038	Draw Down	Direct Booking	18/07/2022	DD	10 hours		Department of Veterinary Medicine	Accepted full	David Jones	20/05/2022 14:21:38	

As soon as 4 workers have accepted your job booking, the calendar booking will turn green, indicating that the job has been filled.

okings						D	avid Jones Department Coordinator
Depa Medi	rtment of cine Booki	Veterinary ngs	Department of Vete	rinary Medicine	Go	ite a Booking 💙	Draw Down Booking
< >	today		ut	n 6 - 12, 2022			day week month
	Mon 6/6	Tue 7/6	Wed 8/6	Thu 9/6	Fri 10/6	Sat 11/	6 Sun 12/6
all-day							
2:30pm							
1pm					1:00 PM - 6:00 PM - 209103 - Demonstrator		
1:30pm					Booking - Department o Veterinary Medicine	of	
2pm							
2:30pm							
3pm							
3:30pm							
4pm							
4:30pm							
5pm							
5:30pm							
6pm							
6:30pm							

Click on the booking 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.

Bookings / Configure Booking		David Jones Department Coordinator 🗸		
Configure Boo	king: Department of Veterinary Medicine			
Booking Ref: 209103	Booking Type * 🕜 First-accept, First-book	Booking created by: David Jones		
Demonstrator Booking	Quantity *			
Booking Date * 🕜	4 x Demonstrator (SP33)			
10/06/2022	Pay Rates (per hour)			
Start Time * 😧	18 to 20         under 18         23 and over         21 to 22           £13.81         £13.81         £13.81         £13.81			
13:00	Event 🕜			
End Time * 😧	None	•		
18:00	Unpaid Breaks * 🕢			
Expiry Date * 😧	1			
03/06/2022 13:00				
Contact 😮				
None				
Cost Code * 😯	Instructions for Workers * 🕢			
PNAG/685.01.G107217 % 100.0	If applicable, you can also provide here terms and conditions attached to this job Normal			
Delete				
Add Cost Code	We need 4 Demonstrators on Friday from 13.00 - 18.00.			
Expenses Require Different Cost Code * 🖓				
No V				
Update Cancel Booking View Confirmed Workers View U	nconfirmed Workers			

### Confirmed Workers:

Bookings / View Confir	med Workers			David Jones Department Coordinator 🗸					
Booking Ref: 20910	3			Date: 10/06/2022 13:00 - 18:00					
You may select up t	o 500 workers fo	or this booking.							
First Name			Last Name						
First Name Searc	h		Last Name Search	Last Name Search					
				Search Clear Search					
Full Name 🖨	Profile	Hours Worked (this week)	Hours Remaining (this week)	Pay Rate (per hour)					
William Quinn	Profile	4:59	43:01	£13.81					
Walter Strike	Profile	14:59	33:01	£13.81					
Wilma May	Profile	4:59	43:01	£13.81					
Wilf Bevan	Profile	4:59	43:01	£13.81					
Displaying <b>all 4</b> work	ers Edit Booking								

### Unconfirmed Workers:

ookings / View Unconfi	David Jones Department Coordinator								
Booking Ref: 209103					Date: 10/06/2022 13:00 - 18:0				
You may select up to	500 workers fo	or this booking.							
First Name			Last Name						
First Name Search			Last Name Search	st Name Search					
Full Name 🕈	Profile	Hours Worked (this week)	Hours Remaining (this week)		Search Clear Search Pay Rate (per hour)				
Michael Davido	Profile	0	48		£13.81				
Olawale Mustafa	Profile	0	48		£13.81				
Fred Francis	Profile	0	18		£13.81				
Julius Mandate	Profile	0	18		£13.81				
Justina Berbar	Profile	0	48		£13.81				
David Morgan	Profile	0	48		£13.81				
Justina Berbar David Morgan Displaying <b>all 6</b> uncon	Profile Profile	0	48		£13.81				

This can also be seen in the list view 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.

Booking Title \$	Ref ¢	Booking Mode \$	Booking Type \$	Booking Date \$	Start Time \$	End Time \$	Contact \$	Department \$	Status \$	Creator \$	Last Modified \$
Demonstrator Booking	209103	Standard	First-accept, First-book	10/06/2022	13:00	18:00		Department of Veterinary Medicine	Accepted full David Jones		30/05/2022 12:03:52
Lecturer_Seminar	209045	Standard	Direct Booking	23/05/2022	15:45	16:45		Department of Veterinary Medicine	Confirmed Wilf Bevan	23/05/2022 14:45:15	
Examiner Booking	209039	Draw Down	Direct Booking	25/07/2022	DD	10 hours		Department of Veterinary Medicine	Wilma May William Quinn Walter Strike		20/05/2022 14:21:38
Examiner Booking	209038	Draw Down	Direct Booking	18/07/2022	DD	10 hours		Department of Veterinary Medicine			20/05/2022 14:21:38

## Finish