

# DASHBOARD USER GUIDE REACTIVATING A WORKER ACCOUNT

## REACTIVATING A WORKER ACCOUNT

### Introduction and Description

A Department Manager needs to reactivate a worker to put them in a new booking, as the worker was originally deactivated because they had not completed any bookings for more than 3 months.

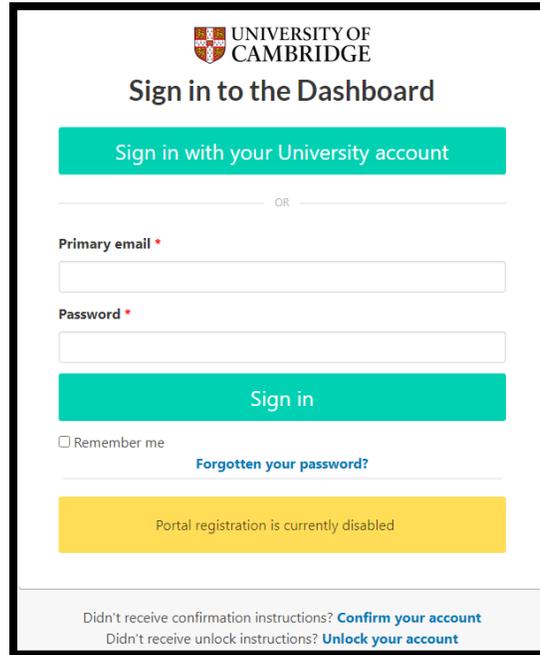
A worker will be deactivated if they have not had a booking for 3 months AND they have no future bookings. When the worker is reactivated, they will have to re-enter their tax information in the Worker Profile before they can be booked into another booking.

**Note!** The Department do not need to do another Right to Work check unless their documents have expired (the system will make that clear by highlighting that section in red).

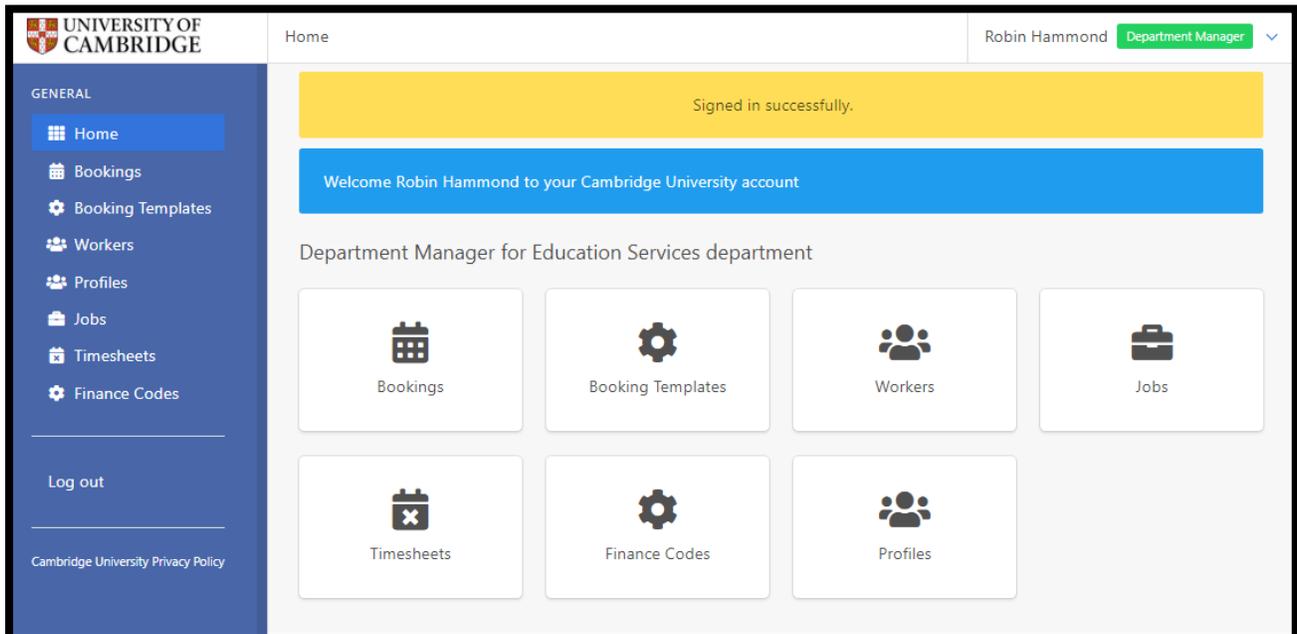
## Step 1

Sign into the UAT Dashboard using your Department Manager account.

<https://cambridgetest.demodashboardtechnology.co.uk>



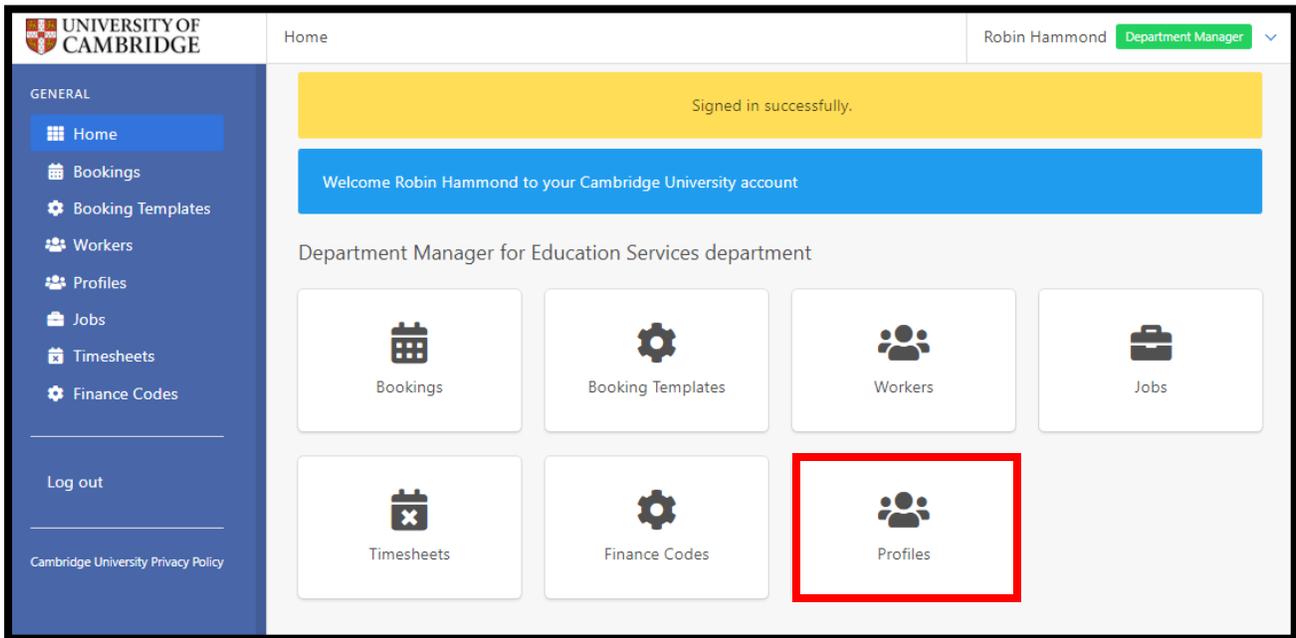
The image shows a sign-in form for the University of Cambridge. At the top is the University of Cambridge logo and the text "UNIVERSITY OF CAMBRIDGE". Below this is the heading "Sign in to the Dashboard". A prominent teal button says "Sign in with your University account". Underneath is a horizontal line with "OR" in the center. The form then asks for "Primary email" and "Password", each with a red asterisk and a corresponding input field. A teal "Sign in" button is below the password field. There is a checkbox for "Remember me" and a link for "Forgotten your password?". A yellow box at the bottom of the form states "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 login. The top left corner features the University of Cambridge logo and the text "UNIVERSITY OF CAMBRIDGE". The top right corner shows the user's name "Robin Hammond" and the role "Department Manager" with a dropdown arrow. The main content area is divided into several sections. At the top, a yellow banner says "Signed in successfully." Below this is a blue banner that says "Welcome Robin Hammond to your Cambridge University account". The main section is titled "Department Manager for Education Services department" and contains eight tiles, each with an icon and a label: "Bookings" (calendar icon), "Booking Templates" (gear icon), "Workers" (group of people icon), "Jobs" (briefcase icon), "Timesheets" (calendar with 'x' icon), "Finance Codes" (gear icon), and "Profiles" (group of people icon). On the left side, there is a dark blue sidebar with the heading "GENERAL" and a list of menu items: "Home", "Bookings", "Booking Templates", "Workers", "Profiles", "Jobs", "Timesheets", and "Finance Codes". At the bottom of the sidebar are "Log out" and "Cambridge University Privacy Policy".

## Step 2

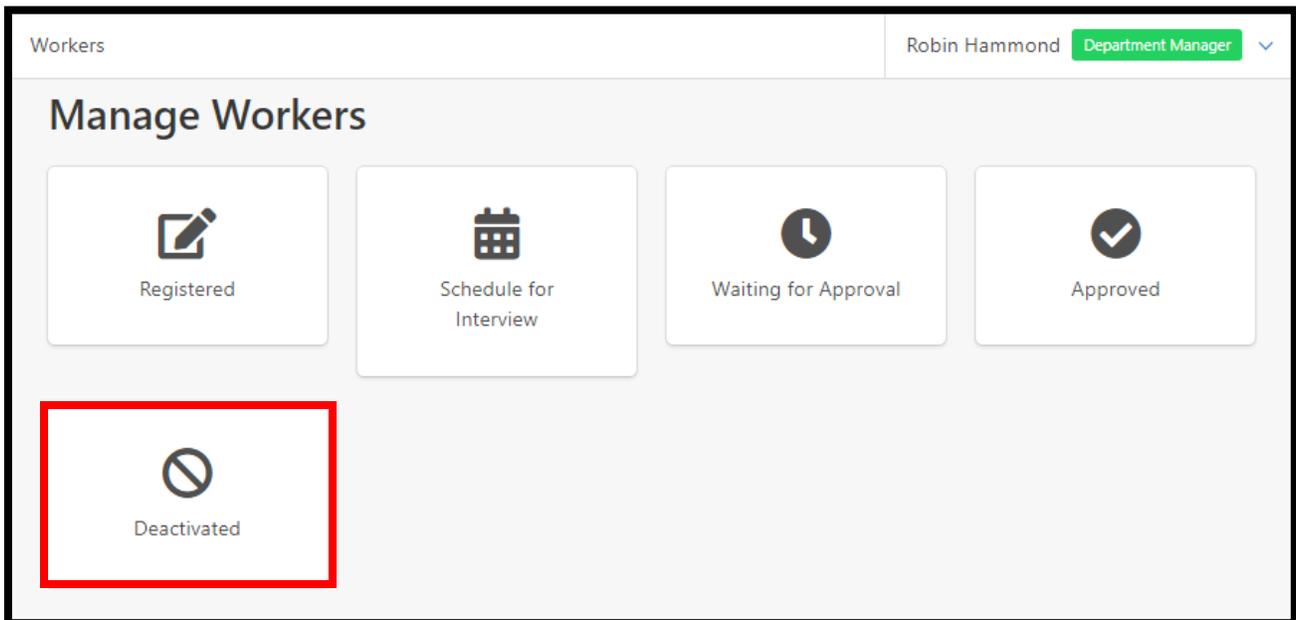
Select the **Profiles** button.



## Step 3

The page will refresh to show the Manage Workers Page.

Select the red **Deactivated** button.



## Step 4

The page will refresh to show the Manage Deactivated Workers Page.

Workers / Deactivated Robin Hammond Department Manager ▾

### Manage Deactivated Workers

**Primary Email**  
Primary Email Search...

**National Insurance Number**  
National Insurance Number Search...

**Full Name**  
First or Last Name Search...

**Passport Type**  
Please Select

**Main Department of Work**  
Please Select

**Visa Type**  
Please Select

[Search](#) [Clear Search](#)

Select All On Page <input type="checkbox"/>	Full Name ▾	Complete?	Last Modified ▾	Actions
<input type="checkbox"/>	Bill King bill@king.comx <span style="color: red; font-size: small;">I am the worker and am deactivating my own profile</span>	✓	22/06/2022 16:06	<a href="#">preview</a> <a href="#">reactivate</a>

[reactivate](#)

All deactivated workers will be listed together with a red note displaying the choice they gave when they deactivated their own account.

## Step 5

Tick the box to the left-hand end of the worker you need to reactivate and then press either of the two green **reactivate** buttons, as shown below:

Workers / Deactivated Robin Hammond Department Manager

### Manage Deactivated Workers

**Primary Email**  
Primary Email Search...

**National Insurance Number**  
National Insurance Number Search...

**Full Name**  
First or Last Name Search...

**Passport Type**  
Please Select

**Main Department of Work**  
Please Select

**Visa Type**  
Please Select

Search Clear Search

Select All On Page <input type="checkbox"/>	Full Name ↕	Complete?	Last Modified ↕	Actions
<input checked="" type="checkbox"/>	Bill King bill@king.comx <small>I am the worker and am deactivating my own profile</small>	✓	22/06/2022 16:06	preview <b>reactivate</b>

**reactivate**

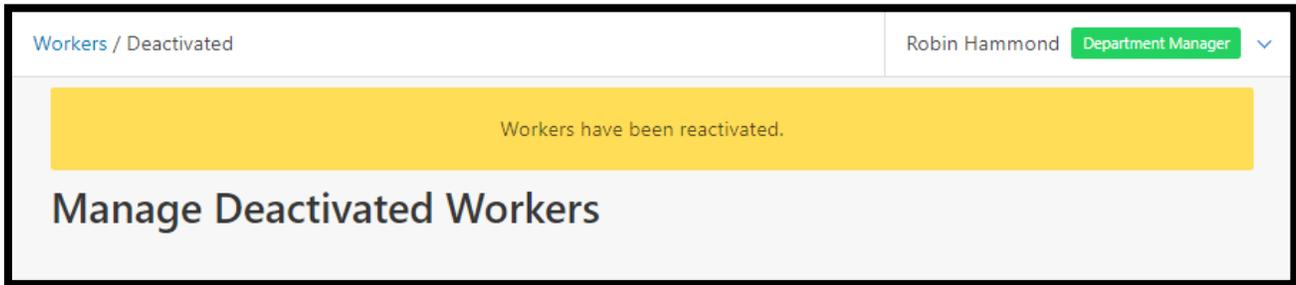
And press **OK** again.

### Please Confirm

Are you sure you want to reactivate the selected workers?

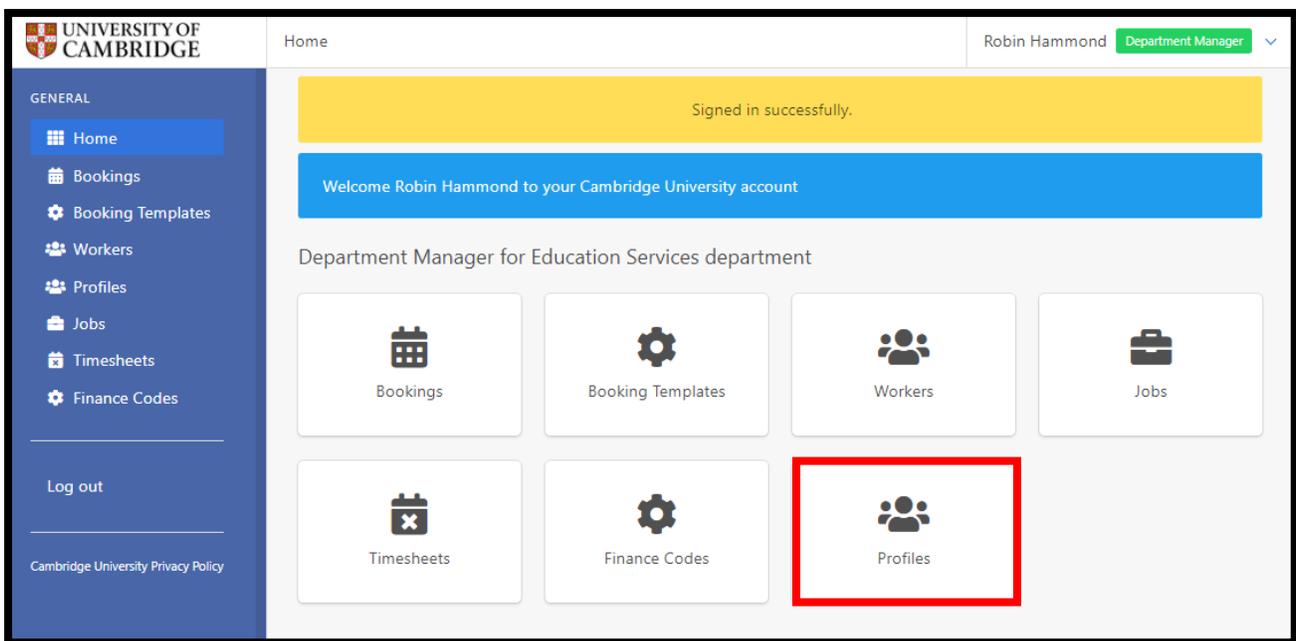
Ok Cancel

The screen will refresh and will display the Manage Deactivated Workers page with a yellow message at the top stating that 'Workers have been reactivated'.



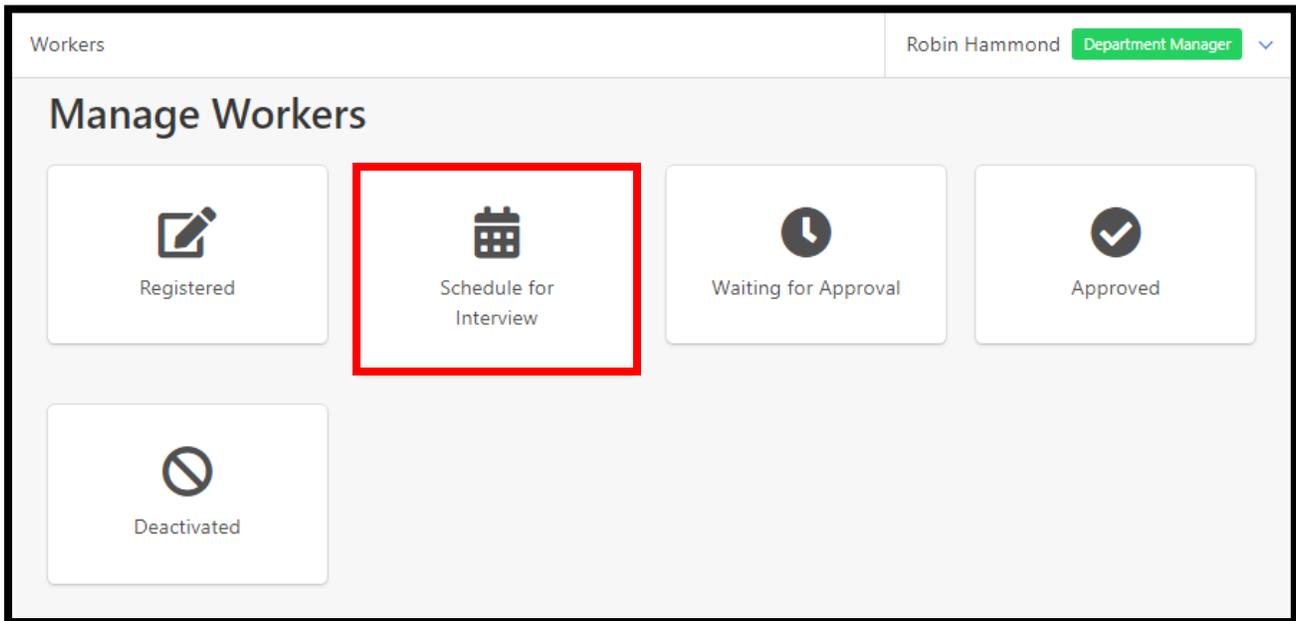
## Step 6

To find the reactivated worker, navigate to the **Profiles** page as shown below:



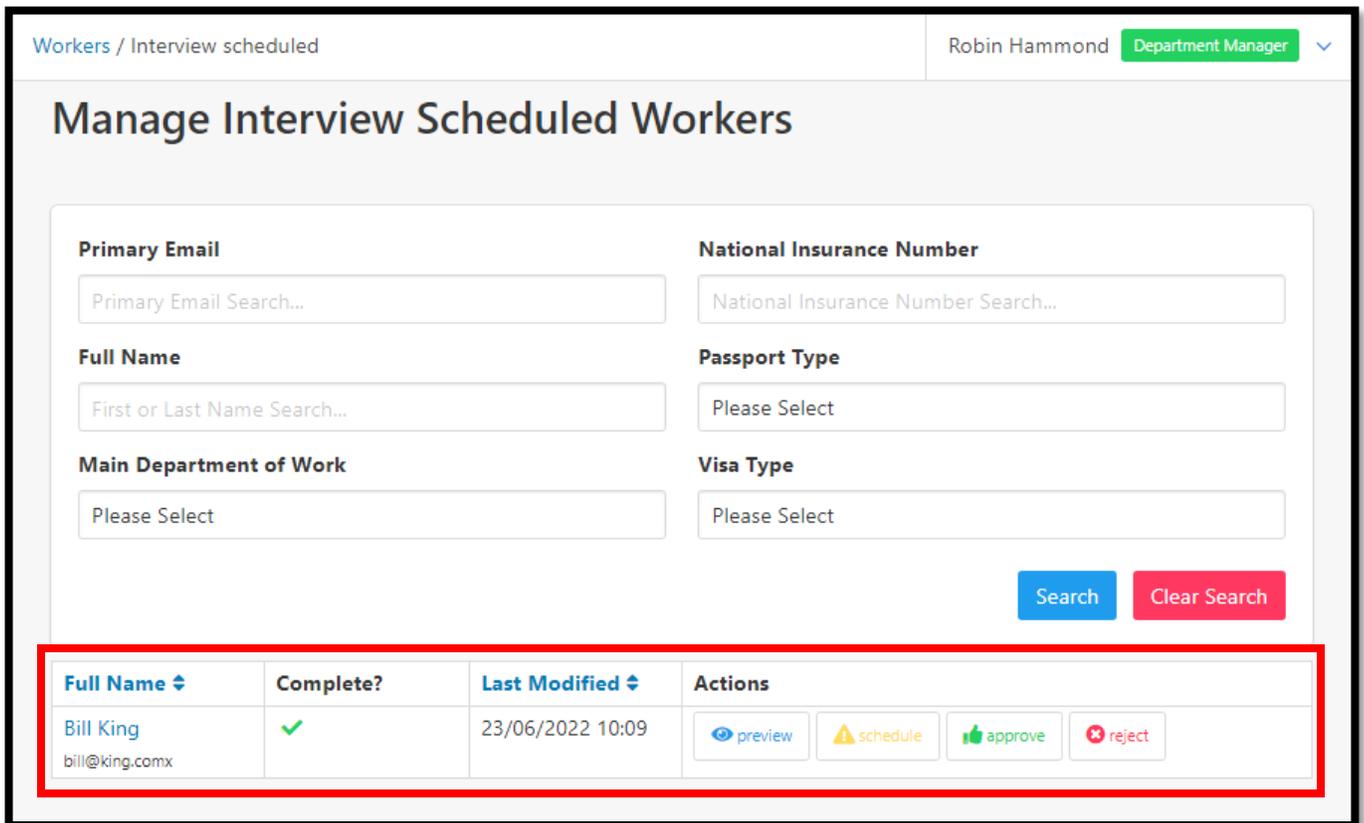
## Step 7

Then select **Schedule for Interview** on the Manage Workers page, as shown below:



The screenshot shows the 'Manage Workers' interface. At the top, it says 'Workers' and 'Robin Hammond Department Manager'. The main heading is 'Manage Workers'. Below this are five buttons: 'Registered', 'Schedule for Interview' (highlighted with a red box), 'Waiting for Approval', 'Approved', and 'Deactivated'. Each button has a corresponding icon: a pencil for 'Registered', a calendar for 'Schedule for Interview', a clock for 'Waiting for Approval', a checkmark for 'Approved', and a crossed-out circle for 'Deactivated'.

The page will refresh to display the 'Manage Interview Scheduled Workers' page with your reactivated worker listed.



The screenshot shows the 'Manage Interview Scheduled Workers' page. At the top, it says 'Workers / Interview scheduled' and 'Robin Hammond Department Manager'. The main heading is 'Manage Interview Scheduled Workers'. Below this are search filters for 'Primary Email', 'National Insurance Number', 'Full Name', 'Passport Type', 'Main Department of Work', and 'Visa Type'. There are 'Search' and 'Clear Search' buttons. At the bottom, there is a table with the following data:

Full Name	Complete?	Last Modified	Actions
Bill King bill@king.comx	✓	23/06/2022 10:09	<a href="#">preview</a> <a href="#">schedule</a> <a href="#">approve</a> <a href="#">reject</a>

## Step 8

Click on the workers name from the 'Full Name' column to display their profile page, as shown below:

Full Name	Complete?	Last Modified	Actions
Bill King bill@king.comx	✓	23/06/2022 10:09	<a href="#">preview</a> <a href="#">schedule</a> <a href="#">approve</a> <a href="#">reject</a>

Workers / Bill King Robin Hammond Department Manager

Your profile submission is waiting for approval

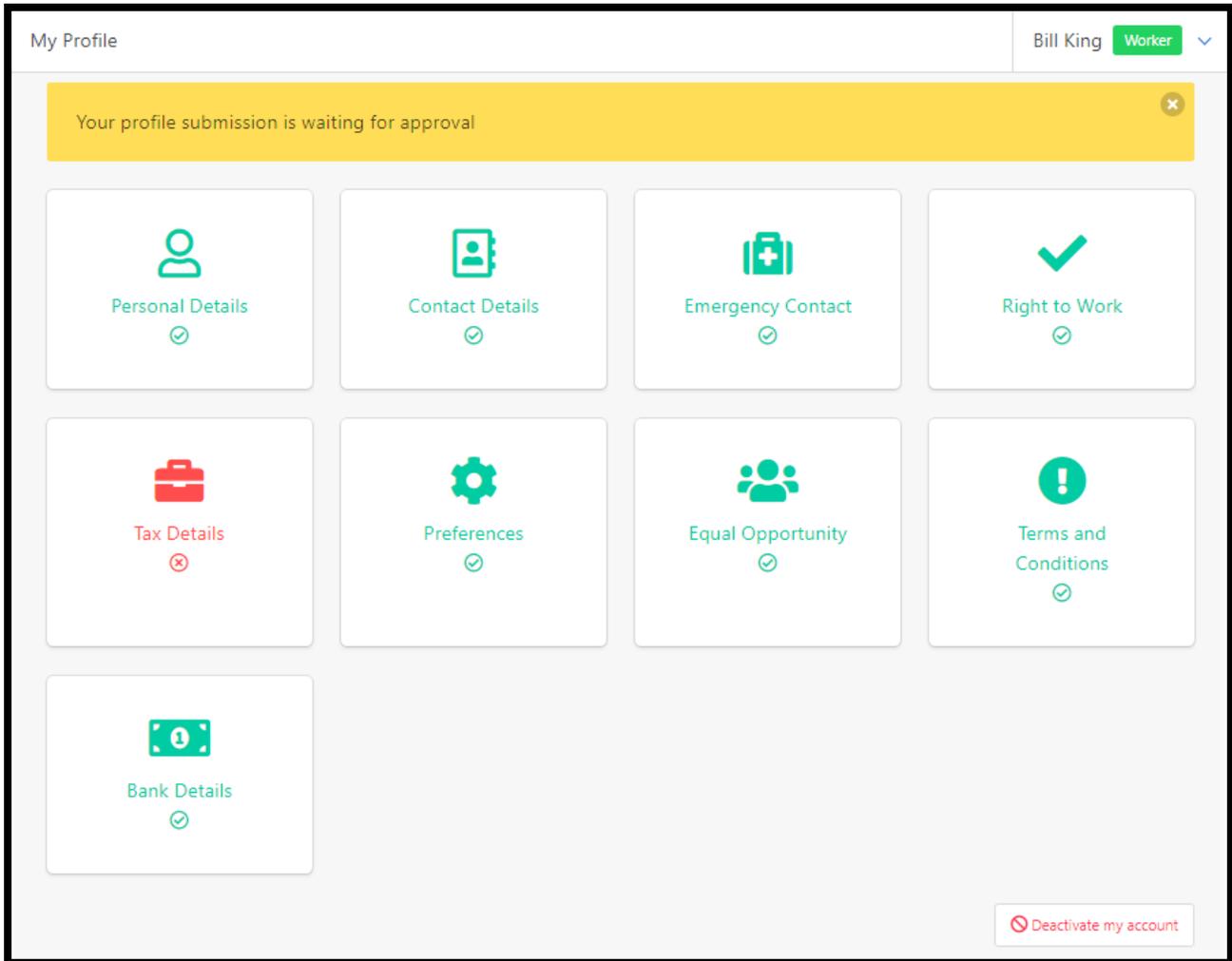
- Personal Details ✓
- Contact Details ✓
- Emergency Contact ✓
- Worker Term Dates
- Right to Work ✓
- CHRIS Details (Central HR Only)
- Tax Details ✗
- Preferences ✓
- Equal Opportunity ✓
- Terms and Conditions ✓
- Bank Details ✓
- Compliance ✓
- Notes
- Profile Audit Trail

As shown above, the worker needs to re-enter their tax information in their Worker Profile 'Tax Details' page, before they can be approved and booked onto another booking.

## Step 9

From the workers point of view, they can now login into Dashboard. Once logged in they need to select their 'My Profile' page.

As shown below the Tax Details panel is now coloured red, prompting them to re-enter their tax information.



## Step 10

The worker re-enters their tax information into this page:

The screenshot shows the 'Tax Details' section of a user profile. At the top, it says 'My Profile / Tax Details' and 'Bill King Worker'. The main heading is 'Tax Details' with a red 'X' icon. Below this is a question: 'Do you have a P45 document? \*'. A dropdown menu is set to 'No'. Below that is a section titled 'Read the following statements carefully and tick the one that applies to you \*'. There are four radio button options: 'This is my first job since 6 April and since the 6 April I've not received payments from Jobseeker's Allowance or Employment and Support Allowance or Incapacity Benefit', 'Since 6 April I have had another job but I do not have a P45. And/or since the 6 April I have received payments from Jobseeker's Allowance or Employment and Support Allowance or Incapacity Benefit', 'I have another job and/or am in receipt of a State, Works or Private Pension', and 'Not applicable'. Below this is another question: 'Do you still have a student loan which is not fully repaid? \*'. A dropdown menu is set to 'Please Select'. At the bottom left is a green 'Update' button.

Once they have done this their 'My Profile' page panels will all be green, as shown below:

The screenshot shows the 'My Profile' page for 'Bill King Worker'. At the top, there is a yellow notification bar that says 'Your profile submission is waiting for approval'. Below this is a grid of profile sections, each with an icon and a green checkmark indicating completion: 'Personal Details', 'Contact Details', 'Emergency Contact', 'Right to Work', 'Tax Details', 'Preferences', 'Equal Opportunity', 'Terms and Conditions', and 'Bank Details'.

## Step 10

Once the worker has completed the steps above the Department Manager can log in and approve the worker.

To do this the Department Manager selects the **Profiles** page followed by the **Schedule for Interview** option which will display the worker waiting for approval.

Press the green **approve** button under the 'Actions' column, as shown below:

Workers / Interview scheduled | Robin Hammond | Department Manager

### Manage Interview Scheduled Workers

**Primary Email**  
Primary Email Search...

**National Insurance Number**  
National Insurance Number Search...

**Full Name**  
First or Last Name Search...

**Passport Type**  
Please Select

**Main Department of Work**  
Please Select

**Visa Type**  
Please Select

Search Clear Search

Full Name	Complete?	Last Modified	Actions
Bill King bill@king.comx	✓	23/06/2022 10:09	preview schedule <b>approve</b> reject

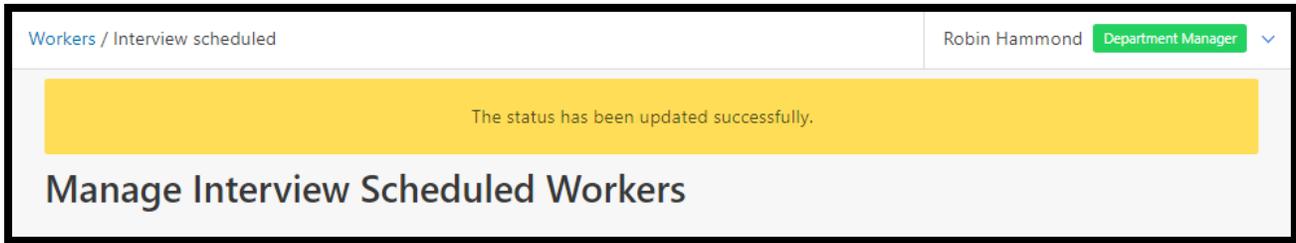
And press OK again.

Please Confirm

Are you sure you want to approve this worker?

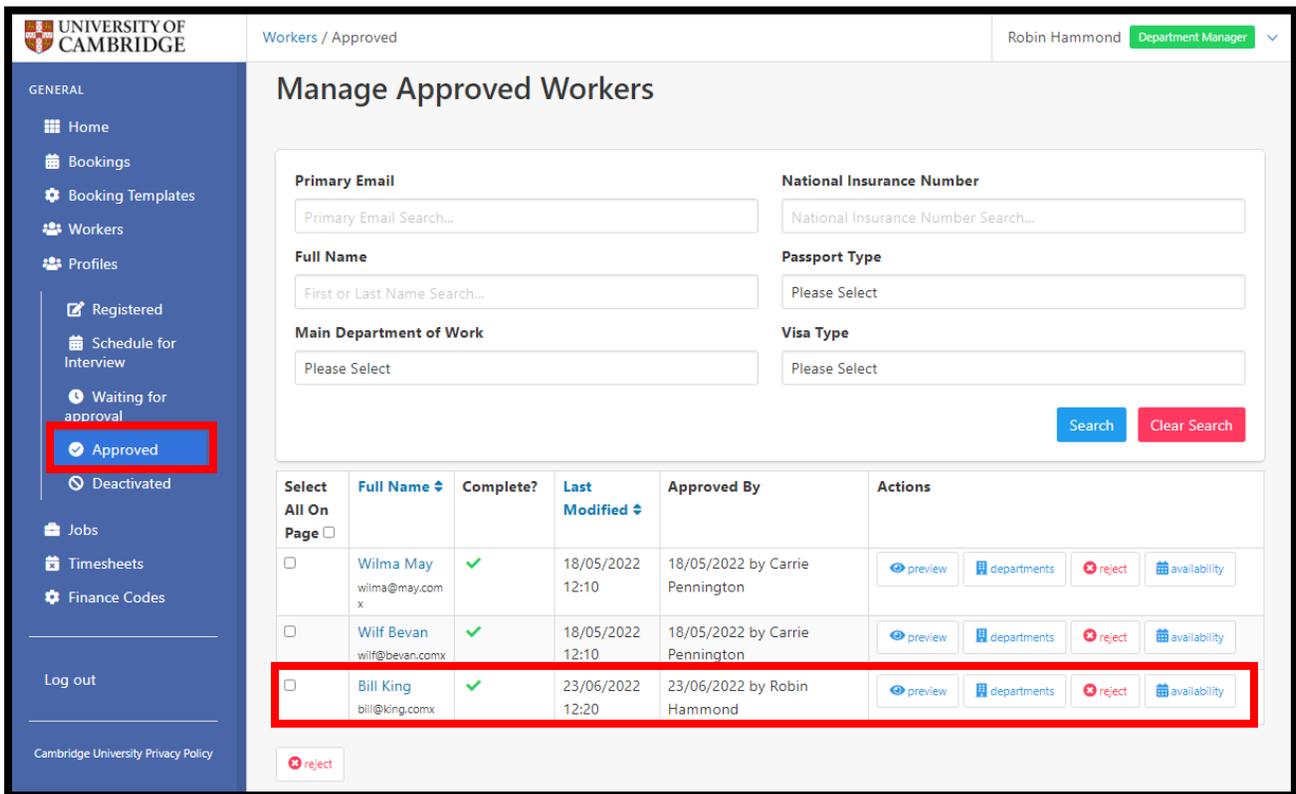
Ok Cancel

The page will refresh displaying a message stating 'The status has been updated successfully'.



## Step 11

Selecting the **Approved** button from the left-hand menu will display the worker in the list with other approved workers, as shown below:



They will now be available to book onto a job.

## Finish