Departmental Administrator guide

Document purpose

- This document provides guidance to the Casual Work Management app for staff designated as Department Administrators who setup new work assignments (Requirement Schedules) in the system.

Navigation

- You can use the menu button in the bottom right of the screen to jump between sections.

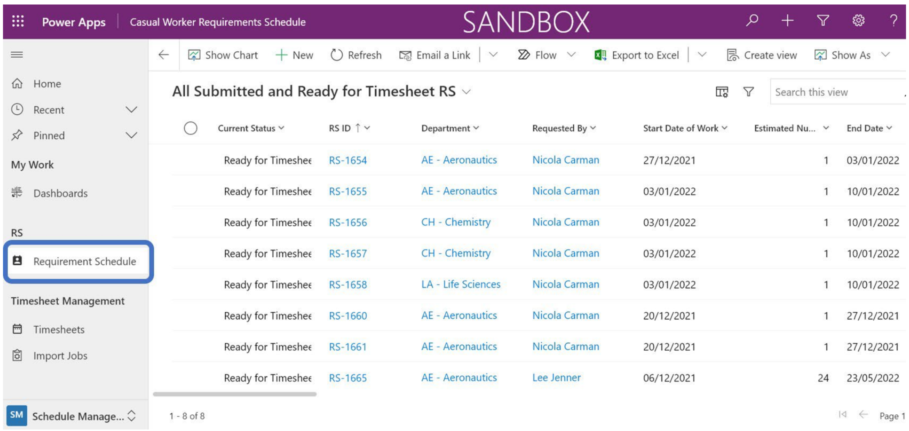
- If you'd prefer these instructions in a video format then please visit [LINK].
- If you have any questions about this document please contact cwcproject@imperial.ac.uk

Open the app

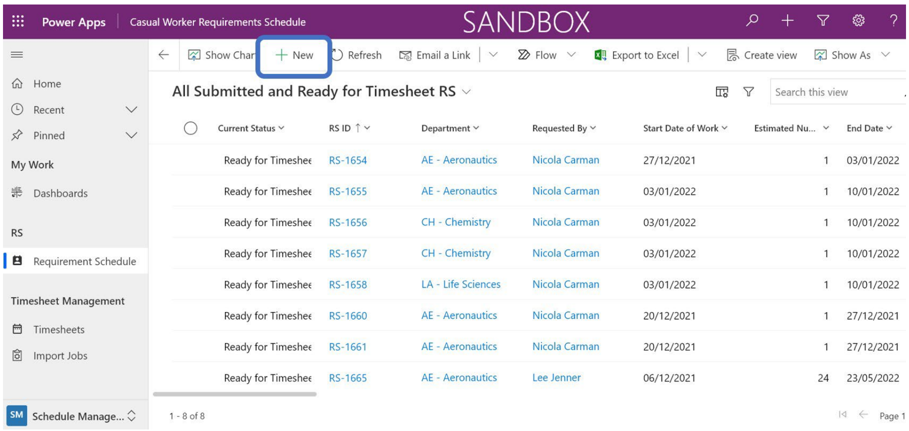
- Open the application in any browser (e.g., Safari, Chrome) ***Note: Internet Explorer is not a compatible browser, please use an alternative.***
- If you are already logged in to other Office365 applications, you will not need to log in. If you are asked to log in, use your Imperial user id and password.
- You will see a dashboards page and a menu down the left-hand side of the screen

Enter a new Requirement Schedule

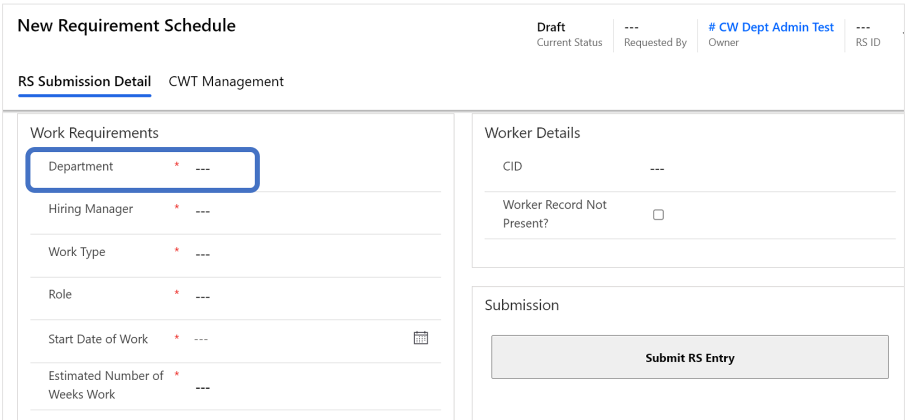
1. Click on Requirement Schedule in the menu on the left



2. Click +New from the list of options along the top



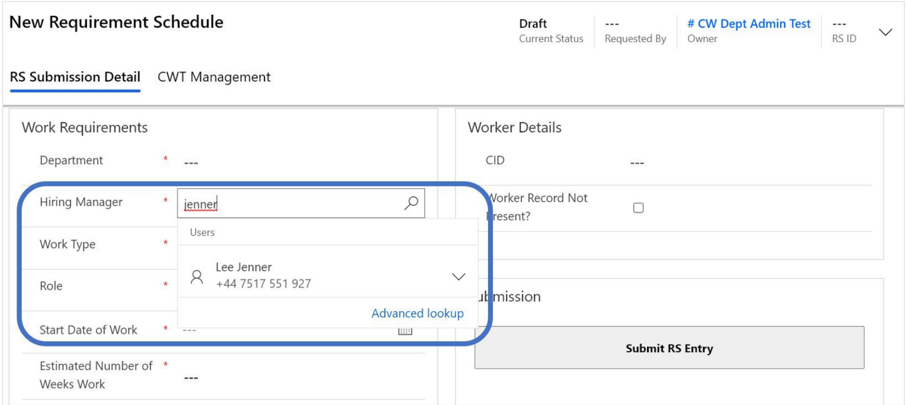
3. Select Department



- Click in the field.
- Click on the magnifying glass to display a list of departments and select or type the two-letter code for the department and select the option that appears.
- The two-letter code in front of the department name is the first two letters of the cost centres for the department.

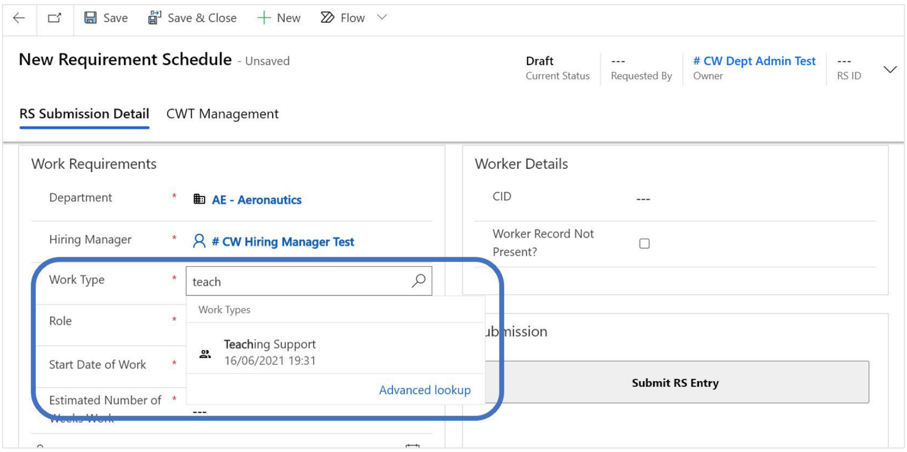
4. Select Hiring Manager

The Hiring Manager is the person that will do the level 1 timesheet approval to confirm that the work was done as submitted. The hiring manager selected here will be the default Hiring Manager when the worker is entering a timesheet for this assignment.



- Click in the field.
- Either click on the magnifying glass to view the full list of hiring managers for the department and select or start typing the name and select from the list that appears.
- If the hiring manager you require is not in the list, one of your department Payroll Approvers can request they are added.

5. Select Work Type



- Either click on the magnifying glass to view the full list of work types and select or start typing the name and select from the list that appears.
- The work types are standard across the College. Roles are associated with a work type.

- *The full list of work types is:*

  - *Teaching Support*
  - *Academic Research*

– Administration Support

– Academic Teaching Visiting Lecturer

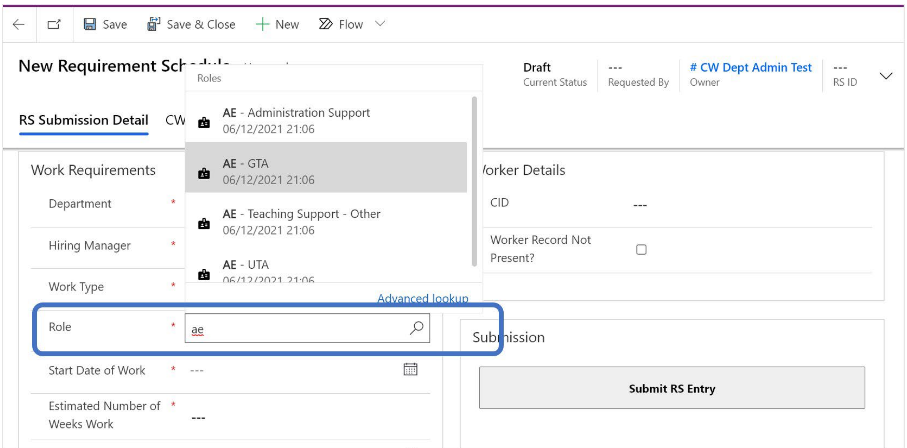
– Professional consultancy

– Student Recruitment and Outreach

– Student Union

– Campus Services

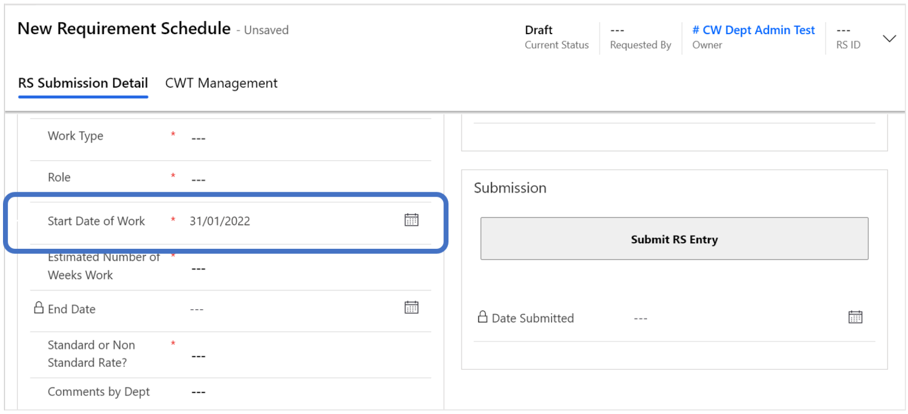
6. Select Role



- Click in the field.
- Either click on the magnifying glass to view the full list of roles for the department that are associated with the selected work type or start typing the role name. (Note – all role names start with the two-letter department code.)
- Select from the list that appears.
- Roles that end in the word "Other" are used to enter an assignment for a non-standard role. If you select one of these you will be prompted to enter the role name and must select Non-standard Rate when you select the rate below.

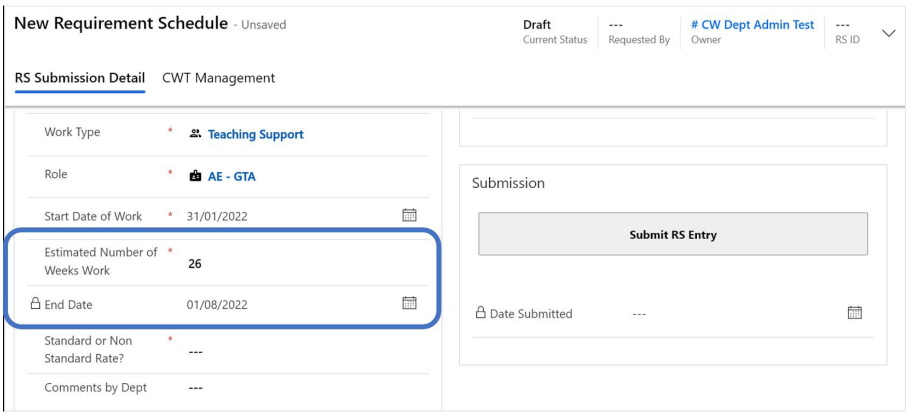
The Payroll Approvers for your department can request changes to the list of roles for the department if required. These should be directed to the Casual Worker team inbox.

7. Select Start Date of work



- Click in the field.
- Use the pop up calendar to select the start date of the assignment.

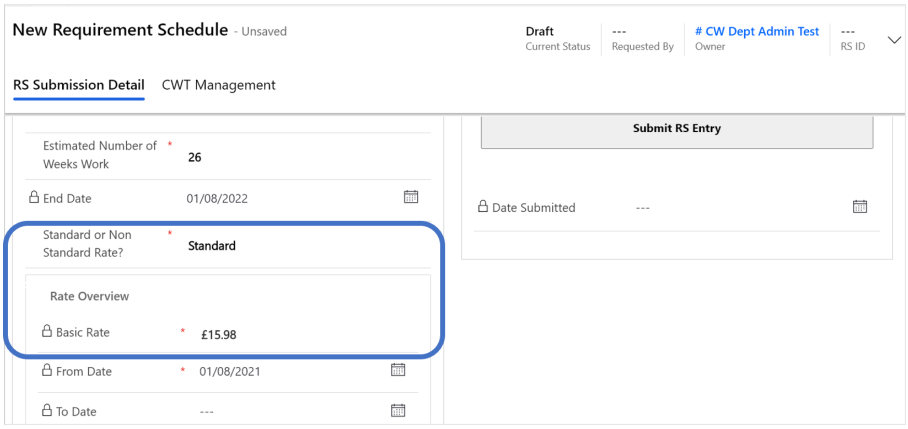
8. Enter Estimated Number of Weeks Work



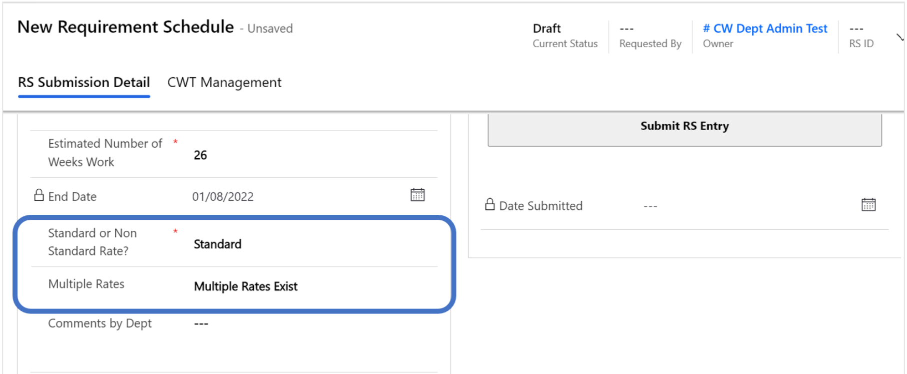
- Type a number between 0 and 51.
- The End Date is calculated by the system and displayed.
- Zero is used for a one day assignment.

9. Select Standard or Non Standard Rate.

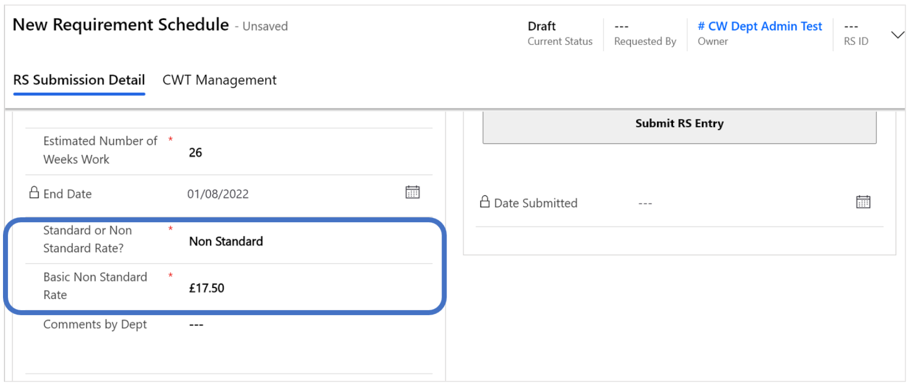
- Click on the field and select either Standard or Non Standard from the list that appears.
- If you have selected a standard role above and plan to pay the standard rate for this assignment, select Standard.
- If there is a single rate for the role, that rate will be displayed. ***(N.B. If the Basic Rate is blank in the display, there is no standard rate for the role and you must select Non Standard and enter a rate.)***



- If there are multiple rates for the role (i.e. the worker will select from the rates available when they enter their timesheets), a note that multiple rates exist will be displayed.



- If you have selected a non-standard role above or you plan to pay a rate other than the standard rate for this assignment or the standard role you selected does not have a standard rate, select Non Standard.



- You are prompted to enter the basic hourly rate, exclusive of holiday pay.

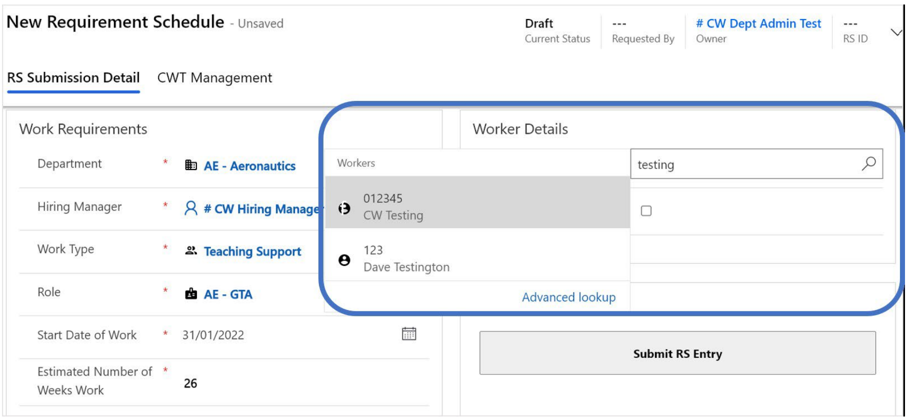
10. Enter Comments – optional

- You can add optionally add a comment about this assignment.

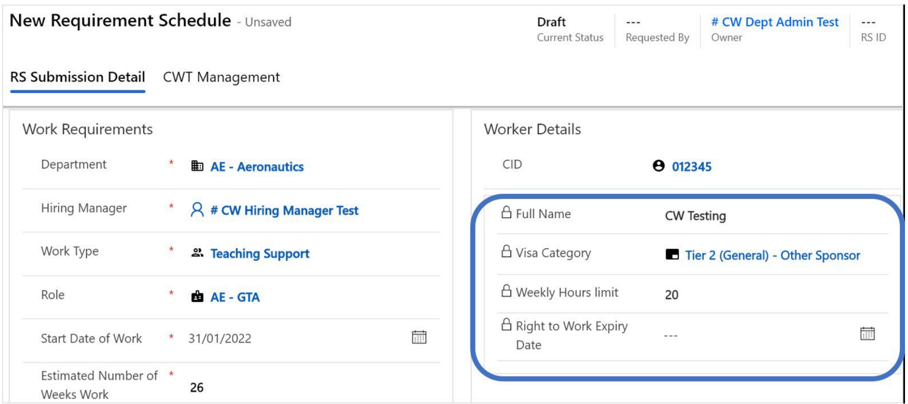
11. Enter Worker Details

If the worker is already an active casual worker anywhere across College:

- In the CID field start typing either their CID or their name.
- When a list appears, select the correct worker.

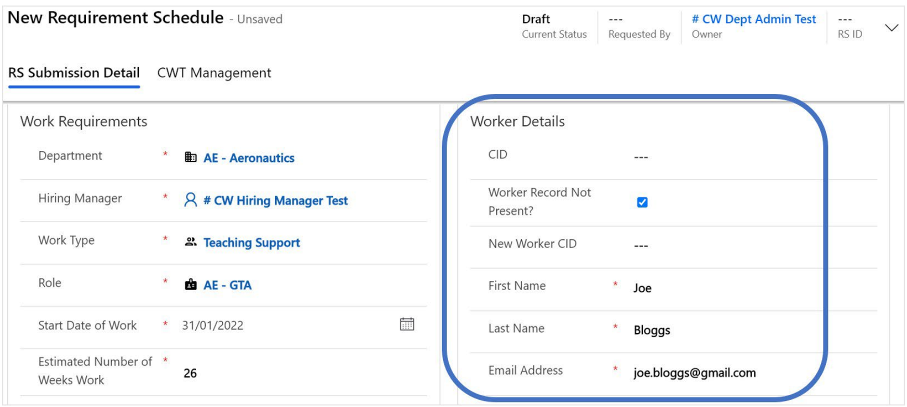


- The worker's visa and Right to Work details are displayed.



If the worker is not in the active casual worker list:

- Click on the Worker Record Not Present box.
- You are prompted to enter the worker's contact details.

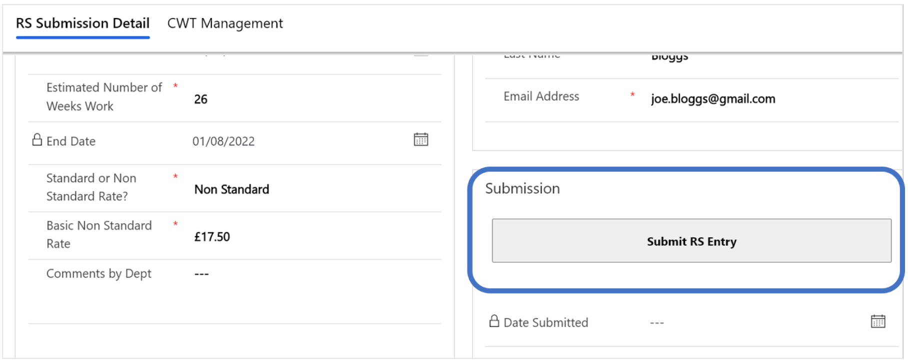


- If the worker has a College ID number please enter it. Otherwise, leave that field blank.

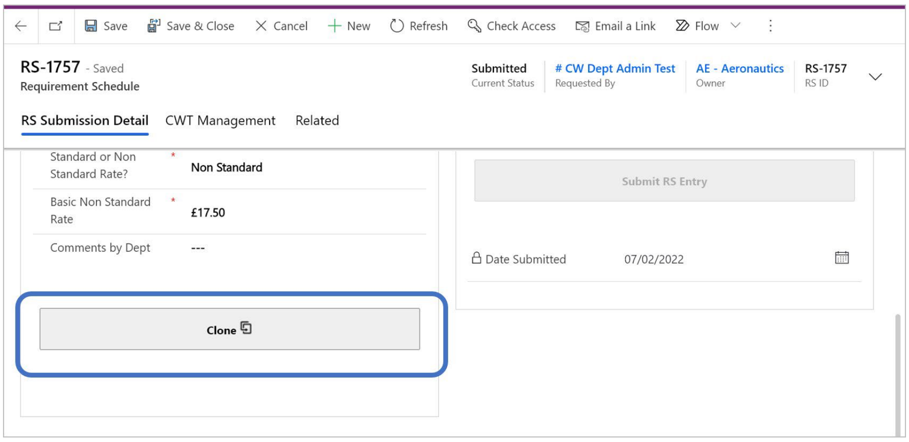
- You must enter First Name, Last Name and Email Address.

12. Save or Submit

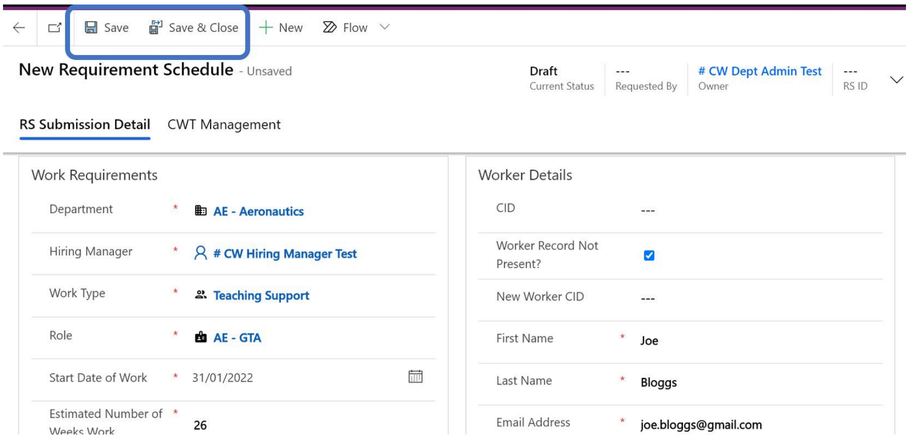
- If you have completed the Requirement Schedule and are ready to submit it to the Casual Worker Team, click the Submit RS Entry button.



- If there are no errors, the Date Submitted is displayed.
- **You are no longer able to make changes to this Requirement Schedule.**
- You are able to Clone a submitted Requirement Schedule. If you want to create a similar RS for a different worker, click the Clone button. A new Requirement Schedule will be open containing all the Work Requirements information from this one which you can edit and add a worker.



- **Please note that when cloning a record, changes to one field will not automatically update another. For example, if you change the role, the rate does not automatically update.** Therefore, make sure that all fields are correct before saving or submitting the record.
- If you would like to save the Requirement Schedule to complete it later, click the Save or Save and Close button at the top of the screen.



- The form will be saved as a Draft which you can find in the list of All Draft RS to open later, make changes and then Submit.

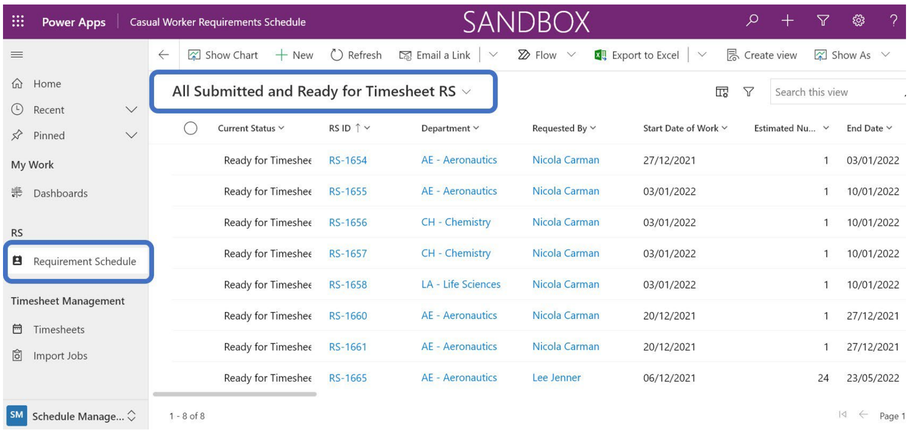
Communication with the Casual Worker team

- Departments with a high volume of casual workers have a dedicated channel in the Casual Worker Requirements Schedule Team in Teams which is used for communication between the Casual Worker Team and the Department Administrators and Payroll Approvers in the department.
- Departments that do not have a dedicated Teams channel will communicate via email using the Casual Worker Team email account. Further information can be found on the Temporary Workforce Service website.

View Requirements Schedules

1. **Click Requirement Schedule in the left-hand menu.**

- The default view “All Submitted and Ready for Timesheet RS” is displayed.



- The data is displayed in columns grouped as follows from left to right:

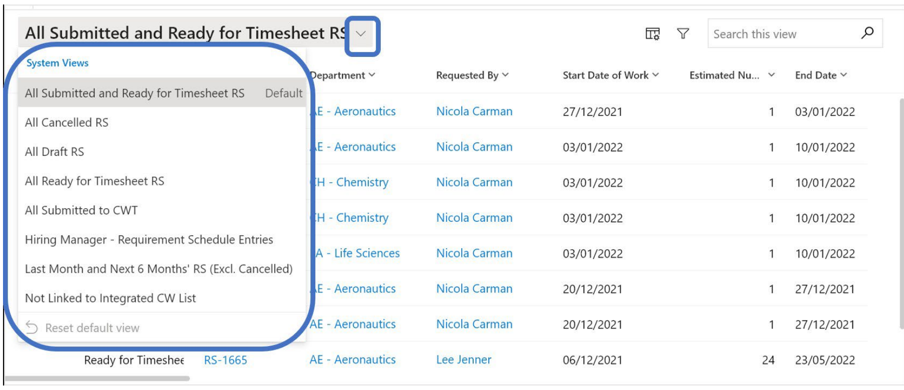
Work requirements	**Worker details**	**Tracking and status dates**
(e.g. Hiring Manager, Role, Rate)	Worker Status will contain a red x if no longer a worker, a yellow triangle if not yet setup in ICIS. Contact details will be removed once picked up by CWT.	Including Date Assignment Can Commence

2. View details of a single RS

- Click on the RS ID to open the Requirement Schedule in the same format it was entered.

3. Change view

- Click on the down arrow beside the view name to display the list of views and select a different one.



- Any views you have created yourself (see instructions below) appear at the top of the list.

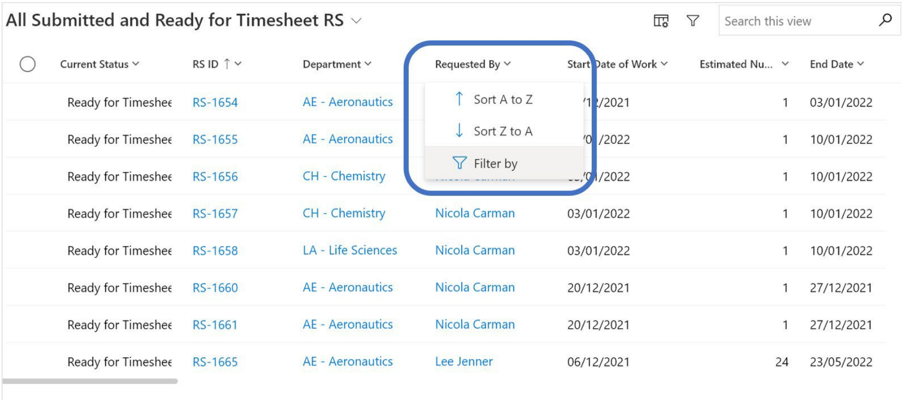
- Each view filters the list of Requirement Schedules:

All Submitted and Ready for Timesheet RS	Displays all Requirement Schedules with a status of Submitted or Ready for Timesheet. The first column indicates the status of each. Submitted means submitted by the Department Admin who created it, the Casual Worker Team is working on it. Ready for Timesheet means the Casual Worker Team have completed RTW checks, issued a contract and setup the worker in the system.
All Cancelled RS	Displays all Requirement Schedules that have been cancelled. (See instructions below for cancelling an RS.)
All Draft RS	Displays Requirement Schedules that are partially complete and have been saved by the creator to be completed and submitted later.
All Ready for Timesheet RS	Lists all Requirements Schedules where work can commence and timesheets can be entered.
All Submitted to CWT	Lists all Requirement Schedules submitted to the Casual Worker Team which are not yet ready for work to commence. The Casual Worker Team will update progress on a Requirement Schedule as they complete the RTW checks, issue a contract and setup the worker in the system, which can be monitored by the Dept Admin by scrolling across the screen to view the relevant columns. The Dept Admin will also be notified by email or the existing Requirements Schedule Teams channel when work can begin or if there are any holdups in the process.
Hiring Manager – Requirement Schedule Entries	Lists all the Requirement Schedules where you are the named Hiring Manager (default Level 1 approver).
Last Month and next 6 Months RS (excl. cancelled)	Lists the current Requirement Schedules and excludes Requirement Schedules for work that completed prior to last month.
Not linked to Integrated CW list	Lists Requirement Schedules where the worker is not yet setup as a casual worker in ICIS.

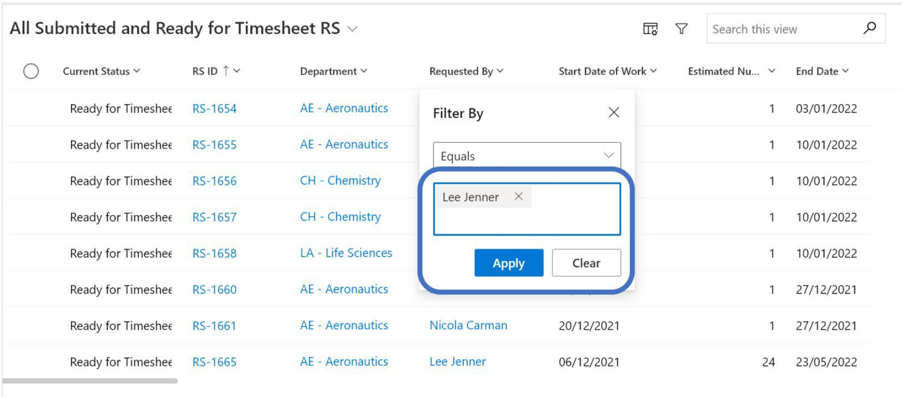
4. Filter and sort

- To filter or sort using any column, click on the column heading.

- A menu appears under the heading.



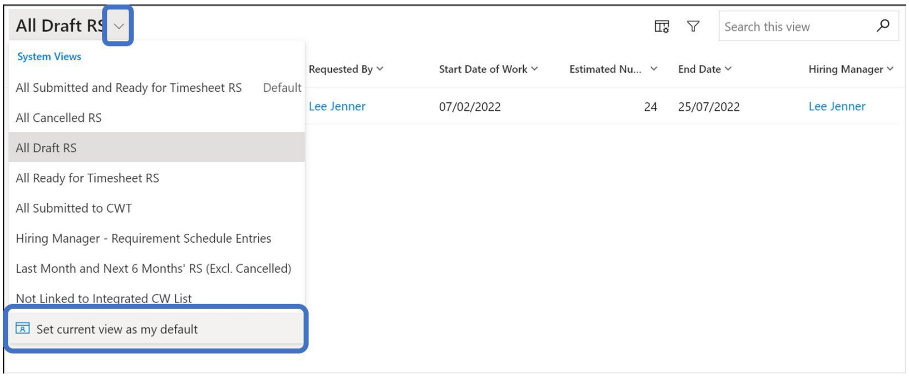
- If you select Filter by, you can start typing and select a value from the list that appears.



- Click Apply to add the filter.
- This sets a temporary filter that is cleared when you change view or leave the app.
- You can clear the filter by clicking on the column heading again and selecting Clear filter.

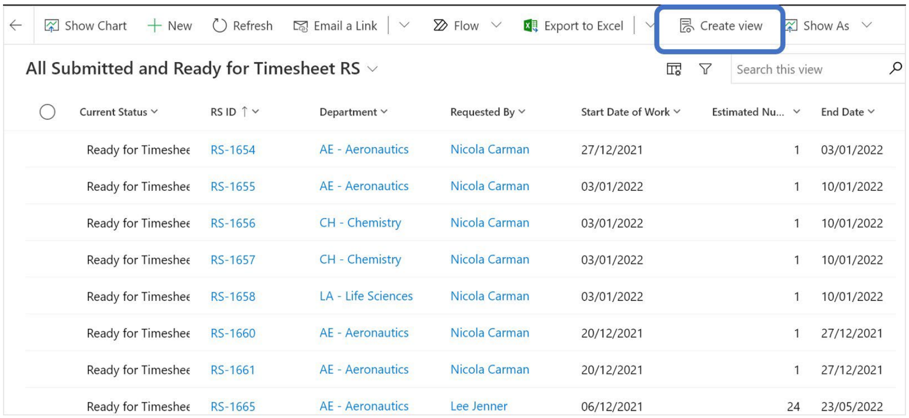
5. Change your default view

- The default view that displays when you click Requirement Schedule in the menu on the left can be changed.
- Change view to the one you want as your default.
- Click the down arrow next to the view name to display the list of views.
- Click “Set current view as my default”.

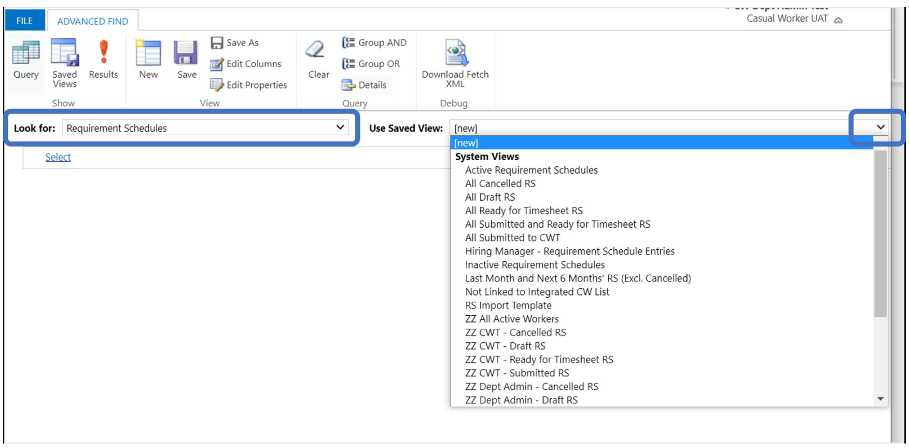


6. Create your own view

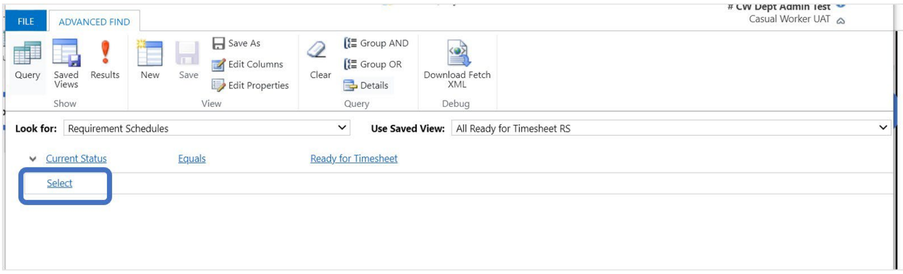
- To permanently save filters, you can create your own views.
- Click Create view in the menu at the top of the screen.



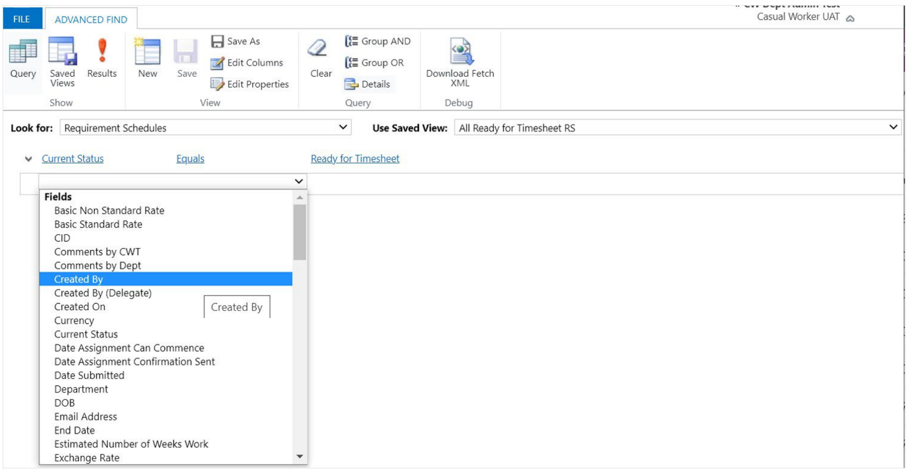
- A pop-up window opens.
- 'Look for' is set to Requirement Schedules. Do not change this.
- Use the down arrow in the Use Saved View field to display and select a view to start from.



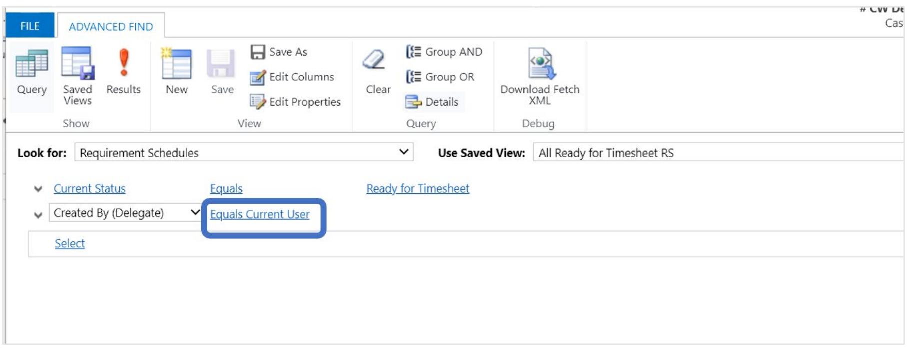
- Click Select.



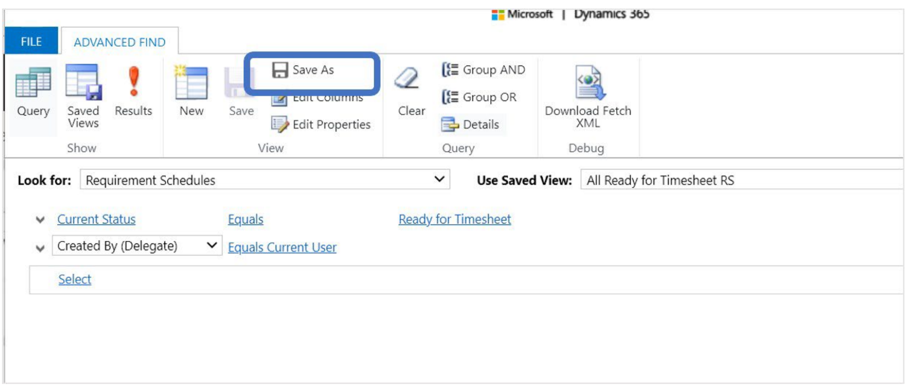
- Scroll down to select the field you want to filter on.



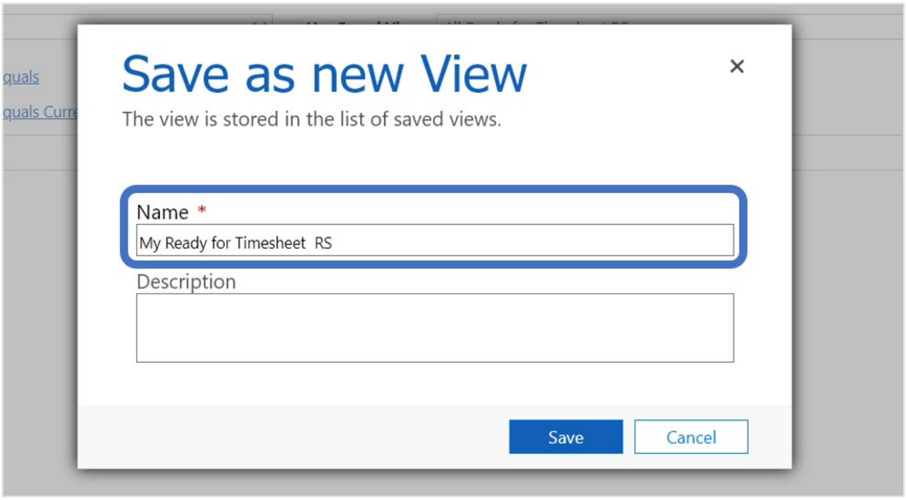
- The wizard will make an initial assumption about the filter you want to set.



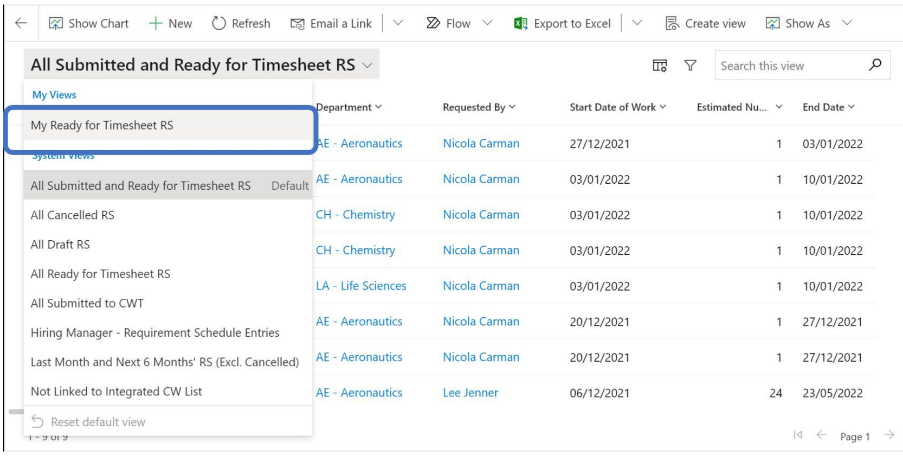
- You can change the filter you just added by clicking on the criteria.
- You can add more filters by clicking Select again.
- Click “Save As” in the menu at the top.



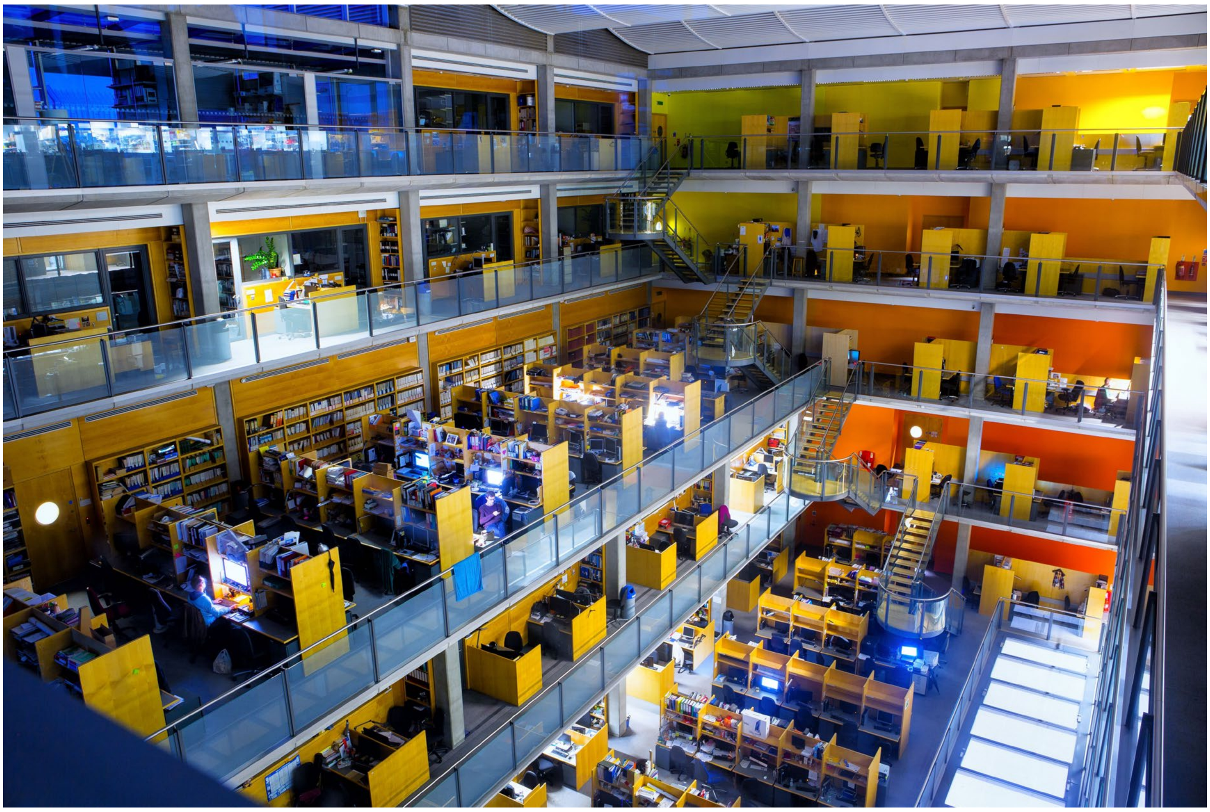
- Change the Name and optionally add a description
- Click Save.



- The new view will appear at the top of your list of views.



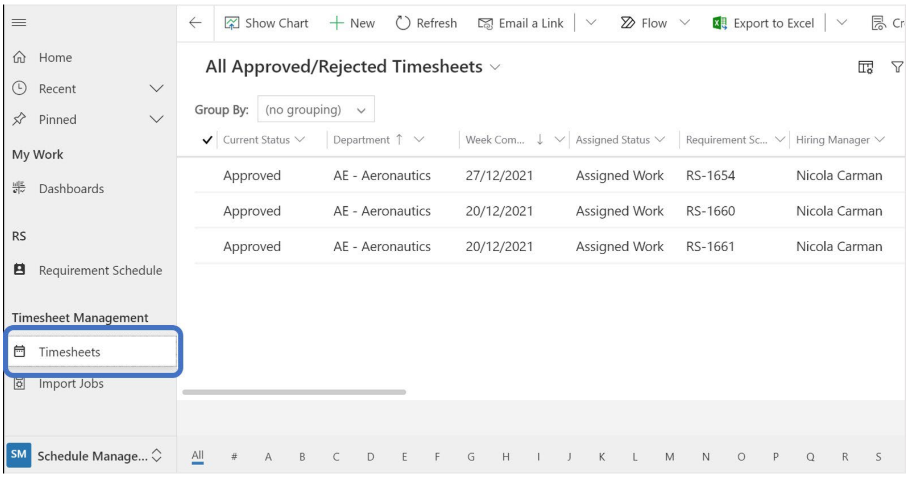
Change an existing Requirement Schedule



- Some changes to existing Requirement Schedules can be made by the Casual Worker Team, others require a new Requirement Schedule to be created.
- **Create a new Requirement Schedule to change:**
  - Role
  - Rate
  - Worker
- **Contact the Casual Worker Team to change:**
  - Hiring Manager
  - Start Date
  - Number of Weeks

View timesheets

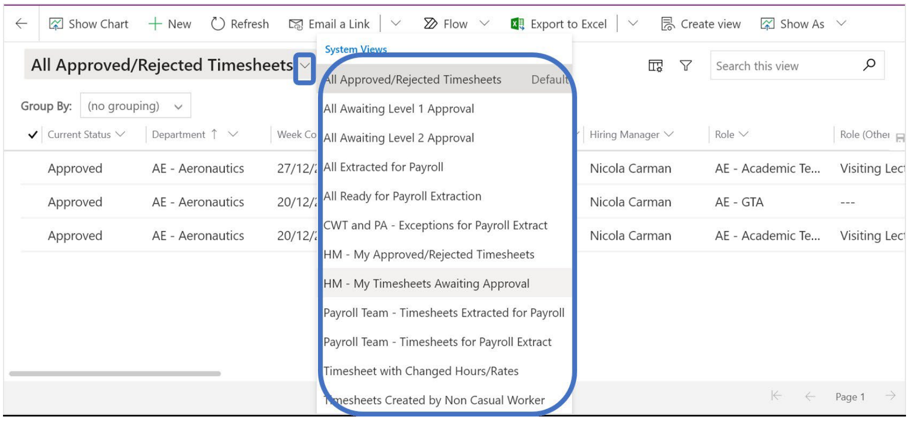
1. Click Timesheets in the left hand menu.



2. Change view

- The default view for Timesheets is HM – My Timesheets Awaiting Approval. As a Department Administrator you will not have any timesheets to approve. If you are also a Hiring Manager, see the Hiring Manager User Guide for further instructions.
- Click on the down arrow next to the view name to display the list of Timesheet views and select.

- Any views you have created yourself appear at the top of the list. (See instructions for creating Requirement Schedule views. The same instructions apply for Timesheets.)



- The data is displayed in columns grouped as follows from left to right:

Current status	Work requirements Hiring Manager, Role	Programme/ Module Entered by worker	Worker CID and name	Comments Entered by worker	Hours & Rate	Cost codes	Level 1 Approval	Level 2 Approval

Change Hiring Manager on a timesheet

If the Hiring Manager named on the timesheet is either incorrect or not available to complete the Level 1 approval, contact the Casual Worker Team to assign the timesheet to an alternative Hiring Manager.

casualworkerteam@imperial.ac.uk

Add/remove data and other access

Departmental Administrators are able to request the following for their department:

- Add/remove roles
- Add/remove rates
- Add/remove cost centres
- Add/remove system access for other members of staff.

Send requests to the Casual Worker Team via email casualworkerteam@imperial.ac.uk.

Further information and support

Information and FAQs are available on the project website and the Temporary Workforce Service website:

- *Casual Worker Compliance Project*
- *Temporary Workforce Service*

Local department contacts:

Many of the departments that regularly hires casual workers have local experts in the system and processes for managing casual work.

The Casual Worker Team (CWT):

Contact the Casual Worker Team via email (casualworkerteam@imperial.ac.uk) or through your department Casual Work Requirements Schedule channel in Teams.