

WebCenter and Contact Roles

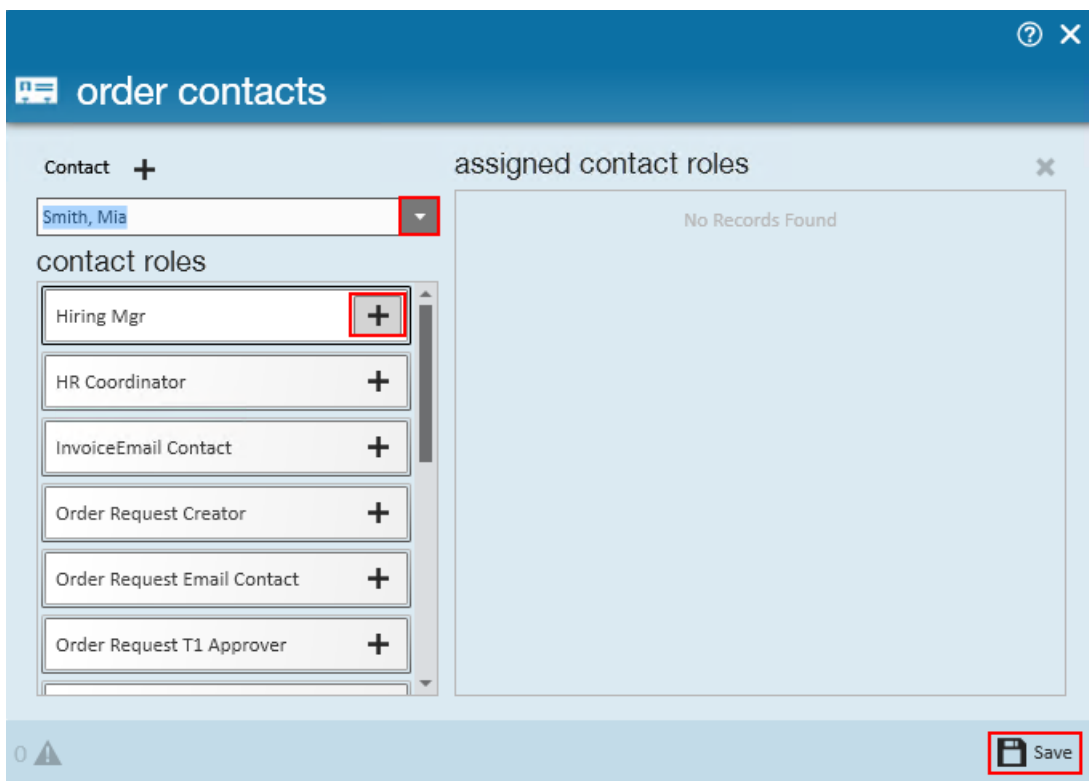
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WebCenter & Contact Roles

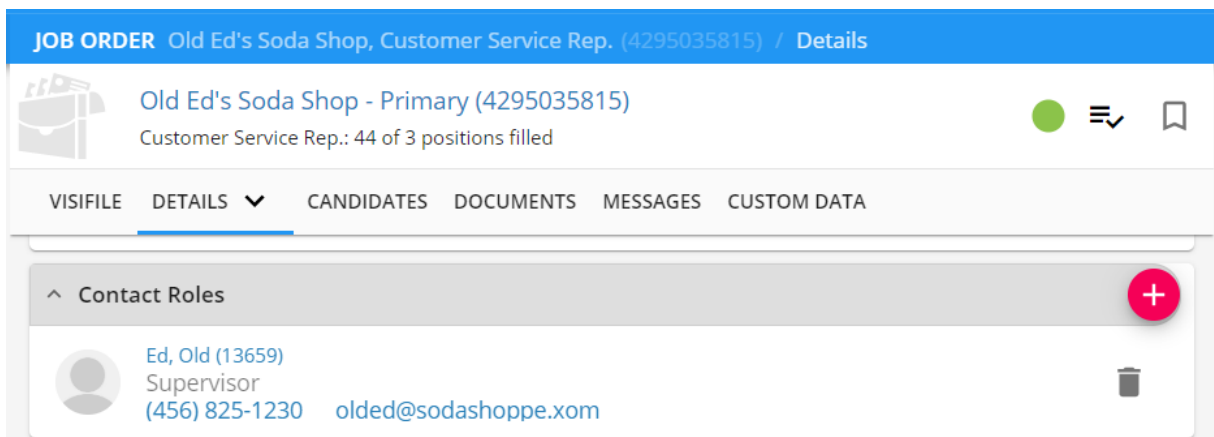
Some WebCenter functionality can be set up to work with contact roles from the customer and order records in Enterprise or Beyond. Contact roles assign specific contacts from a customer with a role on an order. Roles allow you to designate who is the supervisor, hiring manager, HR rep, etc. Default contact roles for a customer can automatically set up roles on any new orders.

To learn more about how to set up and use contact roles:

1. Enterprise: [Enterprise - Using Contact Roles with Orders](#)



2. Beyond: [Beyond - Contact Roles](#)



This article includes:

1. Timecard Workflows & Contact Roles
2. Order Request Workflows & Contact Roles

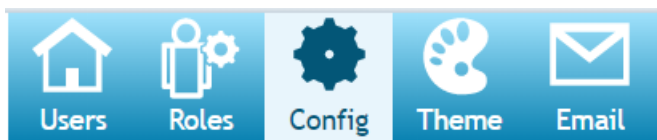
WebCenter Timecard Workflows & Contact Roles

If you are utilizing [WebCenter Timecards](#) to allow your employees to submit time electronically, you will have options to determine how the system chooses who approves the timecards before the time is submitted into Enterprise.

Timecard Workflow Type Config

In order to select which set of contact roles are able to approve WebCenter Timecards, you will need to select the workflow type under the configuration options.

1. In WebCenter admin, navigate to the Configs tab



2. Select the Timecard category on the left

Category	Timecard Template	Default: Default Federal Template	Show Rules (28) ▶
Adjustments			
Candidate Statuses	Timecard Workflow Type	Default: All Contacts (All order contacts will have ability to approve timecard.)	Show Rules (15) ▶
Cost Centers			
Customer			
Customer Candidate	Timecard Bypass Unique Check Allow duplicate timecards to be submitted with the same weekend date, Paycode, CostCode and Payrate.	Default: false	Show Rules (0) ▶
Document Types			
Employee			
Miscellaneous	Timecard Bypass Date Check Allow timecards to be created with a weekend date greater than 1 week from today.	Default: false	Show Rules (1) ▶
Notifications			
Order			
Pay Codes			
Required Documents			
Timecard	Timecard Create Allows a user to create timecards. This will also affect employees being able to create timecards for certain customers if the rules are applied to the customer.	Default: true	Show Rules (10) ▶
TimeClock	Cost Centers Modal Window Choose cost centers in a modal window	Default: false	Show Rules (2) ▶

3. Select the show rules option next to the config "Timecard Workflow Type"

Timecard Workflow Type

Default: All Contacts
(All order contacts
will have ability to
approve timecard.)

Hide Rules (15) ▼

Rules

When: is Use:

[Edit](#) When **Employee** is **Jenkins, Bradford (4295003831)** Default - 1 ✕

Use **All Contacts** (All order contacts will have ability to approve timecard.)

4. Create a new rule for the customer, department, etc.

Example Rules:

- Setting a specific workflow type for an Entity:

Rules

When: is Use:

- Using a workflow type for a specific Customer:

Rules

When: is Use:

- Setting up a workflow type by Employee's Role:

Rules

When: is Use:

Workflow Type & Contact Roles

Below is a list of all the workflow types available and which contact roles are associated with it:

Timecard Workflow Type	Contact Roles Used	Description of how it works
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Timecard Workflow Type	Contact Roles Used	Description of how it works
All Contacts	<ul style="list-style-type: none"> • Supervisor • Timecard alt 1,2,3,4 • Hiring Manager • HR Coordinator • Report To 	Any contact with a role on the order can log into WebCenter to review and approve time.
All Multiple Timecard Approval	<ul style="list-style-type: none"> • Supervisor • Timecard alt 1,2,3,4 • Hiring Manager • HR Coordinator • Report To 	<p>Any contact with a role on the order and log into WebCenter to review and approve time.</p> <p>All contacts must approve time before it's submitted to payroll.</p>
Instant Approval	N/A	Timecard will automatically be approved when it is submitted. This option does not work with any of the contact role options.
ReportTo Approval	<ul style="list-style-type: none"> • Report To 	Only the contact listed under contact roles as "Report To" on the order can approve timecards.
Supervisor Approval	<ul style="list-style-type: none"> • Supervisor 	Only the contact listed under contact roles as "Supervisor" on the order can approve timecards.
Time Fallback	<ul style="list-style-type: none"> • Supervisor • Timecard alt 1,2 	<p>The supervisor will see the timecard submitted first to review and approve it. If the supervisor does not approve the timecard after 5 hours, then Timecard Alt 1 contact will be able to review and approve the timecard.</p> <p>Should both the Supervisor and Timecard Alt 1 be unavailable, Timecard Alt 2 will be able to review and approve the timecard after 10 hours.</p>

Timecard Workflow Type	Contact Roles Used	Description of how it works
Time Fallback by Day	<ul style="list-style-type: none"> • Supervisor • Timecard alt 1,2 	<p>The Supervisor on the order will first be able to review and approve the submitted timecard.</p> <p>If the Supervisor does not approve the timecard by Supervisor main approver additional contacts after the specified day which is after the weekend date?????</p>
Time Fallback ReportTo	<ul style="list-style-type: none"> • Report To • Timecard alt 1,2 	<p>The Report To contact will see the timecard submitted first to review and approve it. If the supervisor does not approve the timecard after 1 hour, then Timecard Alt 1 contact will be able to review and approve the timecard.</p> <p>Should both the Report To and Timecard Alt 1 be unavailable, Timecard Alt 2 will be able to review and approve the timecard after 3 hours.</p>
Two Tier	<ul style="list-style-type: none"> • Supervisor • Hiring Manager 	<p>This option requires both the Supervisor and Hiring Manager to approve the timecards.</p>
Two Tier Timecard Fallback	<ul style="list-style-type: none"> • Hiring Manager • Supervisor • Timecard alt 1,2 	<p>This option requires two contacts to approve the timecards. The Hiring Manager and Supervisor will first be able to review and approve timecards.</p> <p>If there are not two approvals after 5 hours, the timecard alt 1 and alt 2 will be able to review and approve the time.</p>

Now that you have set up the config with a rule to determine workflow type, you can now set up the contact roles on the orders that use WebCenter Timecards.

To learn more about how to set up and use contact roles:

1. Enterprise: [Enterprise - Using Contact Roles with Orders](#)
2. Beyond: [Beyond - Contact Roles](#)

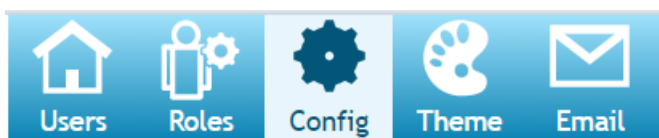
Order Workflows & Contact Roles

If you are utilizing WebCenter to allow your customer contacts to submit [order requests](#), you can set up different approval processes for those requests. Requiring other contacts to approve an order before it's submitted to your staff allows your customer and you more control over what is being submitted.

Order Workflow Types work with contact roles that are either manually set up as the defaults on the customer record or selected during the order request process. Check out [WebCenter Admin - Configuring WebCenter Order Requests](#), for more information.

Order Workflow Types Config

1. In WebCenter admin, navigate to the Configs tab



2. Select the Order category on the left

Category	Order Workflow Type	Default: Instant Order Approval (Automatically approves submitted order)	Show Rules (9) ▶
Adjustments			
Candidate Statuses			
Cost Centers	Order Request Form	Default: Generic	Show Rules (15) ▶
Customer			
Customer Candidate	Allow Selecting Of Order Request Approvers	Default: true	Show Rules (1) ▶
Document Types	Allow selecting of order request approvers on the order request page if there is an order workflow setup.		
Employee			
Miscellaneous	Allow Unlocking of Order Requests	Default: false	Show Rules (4) ▶
Notifications	Allow the user to unlock an order request that is in the process of approval to modify details and create a new order request		
Order			
Pay Codes			

3. Select the show rules option next to Order Workflow Type
4. Create a new rule for a customer, department, etc.

Example Rules:

- Using a customer specific workflow:

Rules

When: is Use:

- Using a department specific workflow:

Rules

When: is Use:

Workflow Type & Contact Roles

Order workflow types only use three contact roles:

- Order Request T1 Approver
- Order Request T2 Approver
- Order Request T3 Approver

The Order Request T1 Approver will be used first. In cases like the Single Order Approval, it will be the only contact role used.

The workflow types available:

- Instant Order Approval - Automatically approves submitted order
- Single Order Approval - Only 1 contact is set to approve the order
- Simple Multiple Order Approval - Multiple contacts are set up as approvers, all receive an email and any one of them can approve the order.
- Priority Multiple Order Approval - All approvers are sent an email but must approve in order.
- All Multiple Order Approval - Multiple contacts are set up as approvers, all receive an email and all have to approve the order.
- Priority Order Approval - Email is sent to the first approver, once they approve the order an email is sent to the second, etc.

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