

Education Module - WebCenter Setup Overview

Last Modified on 08/24/2020 11:29 am CDT

What is the Education Module?

The Education module is an enhanced set of features in both Enterprise as well as WebCenter, that when used in conjunction with each other, allow a school district or a staffing company to manage their substitute teacher order requests, placement and payroll.

WebCenter Setup

Both the school administrators and teachers who will be entering substitute teacher requests in WebCenter (Contacts) as well as the substitute teachers (Employee) who will be viewing and accepting jobs will need to have a WebCenter Account with proper WebCenter User Role permissions.

There will also be set up for additional Educational module features including being able to request or accept requests for substitutes and utilizing WebCenter Timecards to track substitute time.

Setup Includes:

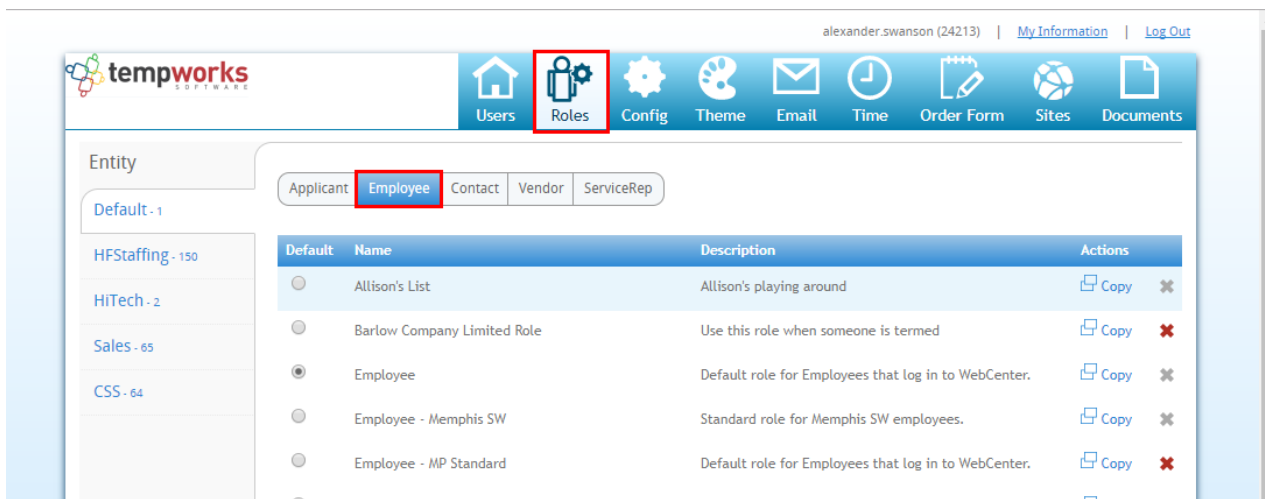
1. [Giving Substitutes, Teachers, and Admins Access](#)
2. [Setting Up Substitute Request Forms](#)
3. [Configuring Substitute Timecards](#)

Giving Substitutes/Teachers/Admins Access

You will want to set up specific roles for your substitutes, teachers, and administrators to ensure they have access to exactly what they need.

Setting Up Substitute Teacher Role (Employee)

In WebCenter Admin, click on the Roles Button, then select Employee:



We recommend you create a separate User Role for substitutes giving them this permission, as traditional staffing employees you generally do not want them to be able to self assign to orders.

Substitutes will need the "Employee - Orders" Permission checked in order to accept substitute requests in the system.

Role Settings and Permissions

Role Name: Sub Teacher [edit](#)

Role Description: Allows sub to accept orders [edit](#)

Role Permissions

- Common - Functionality available to every type of user
- Employee - Assignments - Shows a list of employee assignments with directions and contact info
- Employee - Calendar - Shows an employee thier assignment calendar
- Employee - Documents - Shows a list of documents an employee can download
- Employee - Home - Shows links to an employee's current assignments and timecards, and displays alerts and messages
- Employee - JobBoard - Allows an employee access to the JobBoard
- Employee - Orders - Allows an employee to view orders and accept or decline orders.**
- Employee - PayHistory - Shows an employee all their paychecks and allows them to print a summary
- Employee - Timecards - Allows employee to fill out, edit, submit and review their own timecards
- Profile - Address - Allows a user to change their mailing address.
- Profile - Employee - Allows a user to upload and update resumes and other documents
- Profile - Info - Allows a user to edit their email, password
- Profile - Notifications - Allows user to re-subscribe to unsubscribed notifications

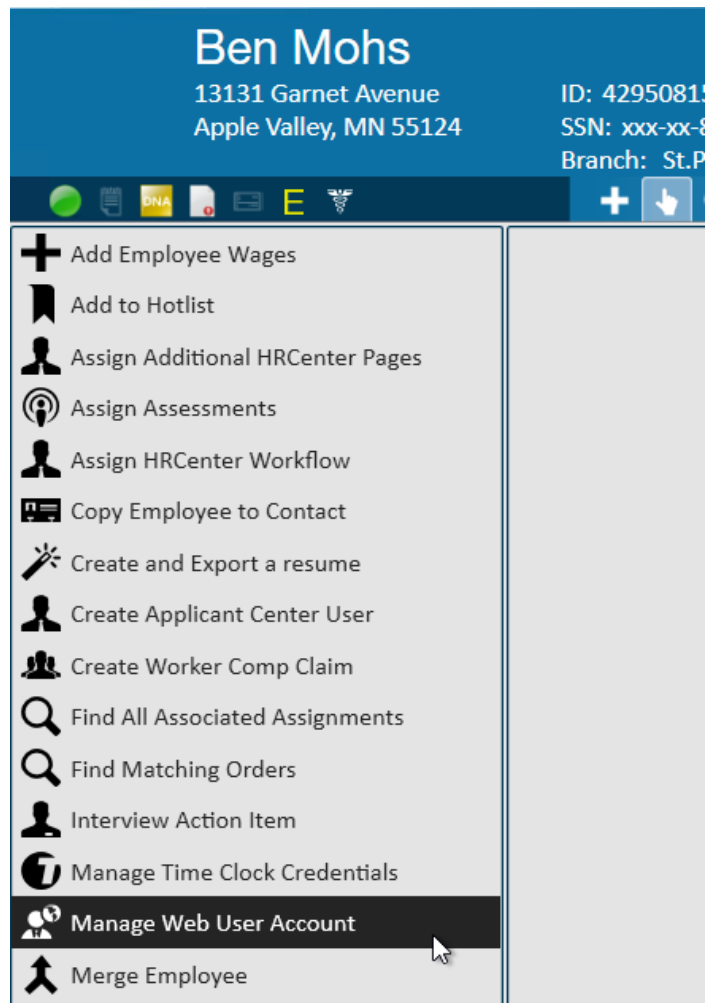
[Save](#)

Want to learn more about Employee WebCenter Roles? Check out [WebCenter Admin: Employee Roles and Configs](#).

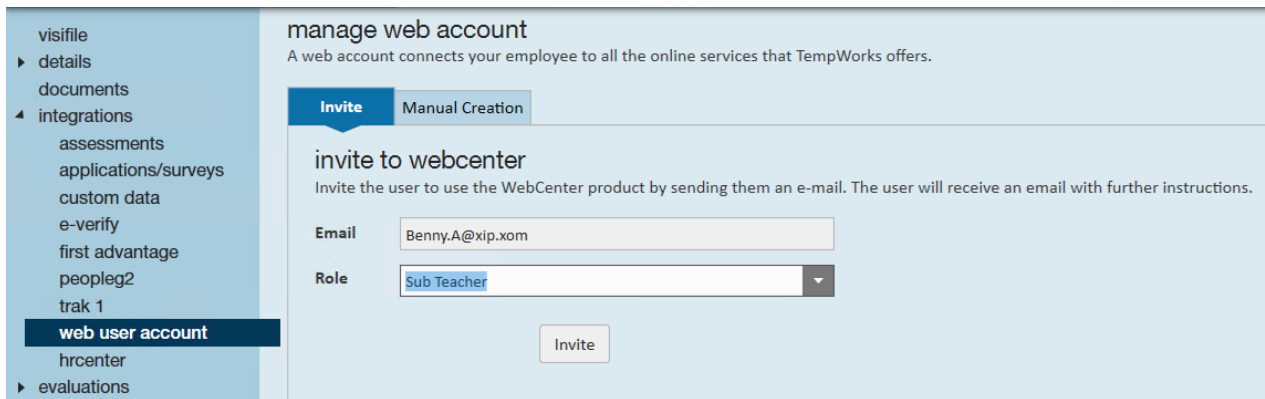
Inviting Substitutes to WebCenter

Each substitute in your system will need to be invited to use WebCenter and given the proper role to be able to see and accept substitute requests. Substitutes are part of your employee base. You will need to [create an employee record](#) for each Sub if you have not already.

On the employee's record in Enterprise, navigate to the actions menu and select Manage Web User Account



Invite them via email and select the appropriate Substitute WebCenter Role you created:



For more information on Web User accounts in Enterprise, check out [Manage Web User Account](#).

Setting Up Teacher/Administrator Role (Contact)

The Teachers and Administrators (Contacts) will need a WebCenter role that gives them access to see the orders in WebCenter. It is this same permission that also allows them to submit order requests.

In WebCenter Admin, click on the Roles Button, then select Contact:

alexander.swanson (24213) | [My Information](#) | [Log Out](#)

Entity: **Default - 1**

Applicant | Employee | **Contact** | Vendor | ServiceRep

Default	Name	Description	Actions
<input type="radio"/>	Customer Limited	Default role for a Customer Contact that logs into the Customer portal of WebCenter.	Copy X
<input type="radio"/>	Customer - Timecard Approver	Role for customer contact this is approving time online.	Copy X
<input type="radio"/>	Customer (Billing)	View invoices, reports, and receive notifications.	Copy X
<input checked="" type="radio"/>	Customer Supervisor	Default role for a Customer Contact that logs into the Customer portal of WebCenter.	Copy X
<input type="radio"/>	Customer Supervisor no timecards	Supervisors who do not have access to timecard information	Copy X
<input type="radio"/>	Customer Supervisor with TimeClock	Default role for a Customer Contact with TimeClocks installed.	Copy X
<input type="radio"/>	Customer Timeclock Only	Access to reports and timeclock functionality only.	Copy X
<input type="radio"/>	Customer Timeclock/Orders	Default role for a Customer Contact that logs into the Customer portal of WebCenter.	Copy X
<input type="radio"/>	Education Admin	Role for customer contact this is approving time online.	Copy X
<input type="radio"/>	Educator	Role for Educator Contact that can submit orders.	Copy X

Teachers/Admins will need the "Customer - Orders" permission checked in order to see the orders tab in WebCenter.

If the contact has this permission AND a configuration is turned on to allow orders to be created/submitted via WebCenter, Contacts with this permission will be able to submit substitute teacher requests via WebCenter.

Role Settings and Permissions

Role Name: Education Admin [edit](#)

Role Description: Role for customer contact this is approving time online. [edit](#)

Role Permissions

- Common - Functionality available to every type of user
- Customer - Documents - Shows a list of documents a customer can download
- Customer - Employees - Allows customer to find all assignments for them to which an employee is assigned
- Customer - Home - Shows links to a customers timecard and order pages, as well as messages and alerts
- Customer - Invoices - Shows customer a list of paid and unpaid invoices, and offers a button to pay
- Customer - Orders - Shows customer a list of their orders**
- Customer - Reports - Shows customer a list of reports they can run
- Customer - Timecards - Allows customer to create, fill out, review, correct, accept or reject web timecards
- Customer - TimeClock - Allows a customer to view, edit, and submit TimeClock timecards.
- Profile - Info - Allows a user to edit their email, password
- Profile - Notifications - Allows user to re-subscribe to unsubscribed notifications

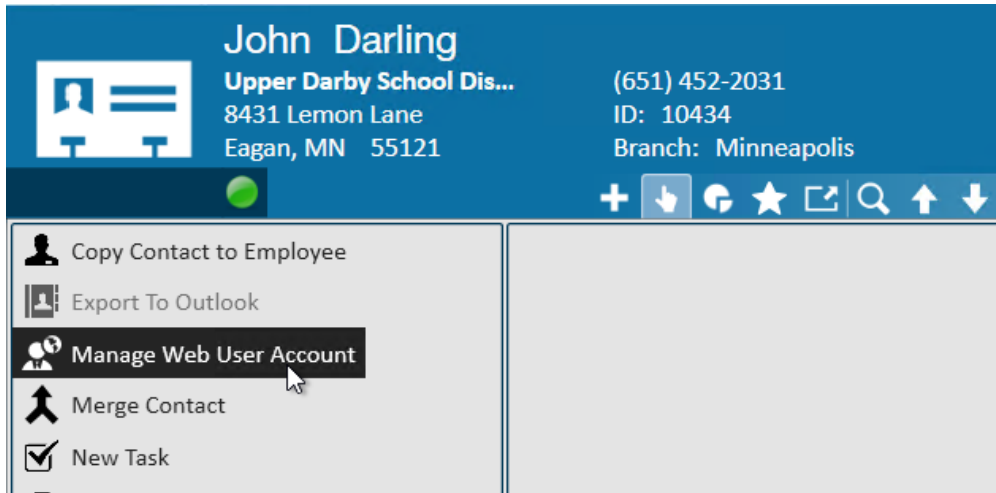
[Save](#)

Want to learn more about Contact WebCenter Roles? Check out [WebCenter Admin - Setting up WebCenter Roles](#).

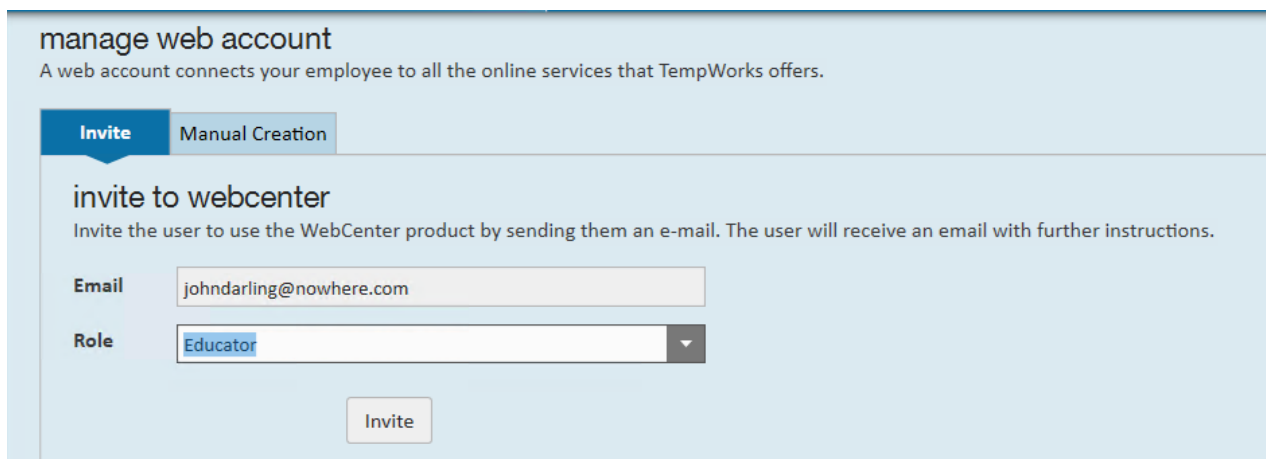
Inviting Teachers/Admins to WebCenter

Once you have set up a role for teachers/admins, you will need to invite them to WebCenter so they can access the information they need. Teachers and admins for the school district will be set up as contacts under the school district (customer) records. Each teacher or admin that will be submitting, reviewing, or approving requests for substitutes, will need to be invited to WebCenter.

On the contact's record, navigate to the actions menu and select Manage Web User Account:



Invite them via email and select the correct role for teachers/admins:



For more information on Web User accounts in Enterprise, check out [Manage Web User Account](#).

Setting Up Substitute Request Forms

Your teachers or admins can request Substitutes via WebCenter. For more information on how to set up this option and how your teachers/admins access the form, check out [Education Module - WebCenter Substitute Request Setup & Overview](#).

alexander.swanson (24213) | [My Information](#) | [Log Out](#)

(+) New Order Request Form ✖ Delete

Form Name: Save Cancel

Drag and drop to reorder or remove fields from the form. When finished, click "Save". Rules for Order Request Form use can be set in the Config screen under the Order category. *The Generic Order Request Template has all items but Bill Rate.

Active	Inactive
+ Teacher Name <input checked="" type="checkbox"/> Required	+ Number of Personnel Required
+ Absence Start Date <input checked="" type="checkbox"/> Required	+ Job Description
+ Absence End Date <input checked="" type="checkbox"/> Required	+ Purchase Order
+ Absence Start Time <input checked="" type="checkbox"/> Required	+ Shift
+ Absence End Time <input checked="" type="checkbox"/> Required	+ Worksite
+ Absence Reason <input checked="" type="checkbox"/> Required	+ Start Date
+ Job Title <input checked="" type="checkbox"/> Required	+ Start Time
+ Pay Rate <input checked="" type="checkbox"/> Required	+ Duration
+ Department Name <input checked="" type="checkbox"/> Required	+ Supervisor Phone Number
+ Start Sub Date <input checked="" type="checkbox"/> Required	+ Bill Rate
+ End Sub Date <input checked="" type="checkbox"/> Required	
+ Start Sub Time <input checked="" type="checkbox"/> Required	
+ End Sub Time <input checked="" type="checkbox"/> Required	
+ Requested Sub <input type="checkbox"/> Required	
+ Supervisor <input checked="" type="checkbox"/> Required	

Configuring Substitute Timecards

You can have your substitutes not only accept assignments in WebCenter, but also create timecards that can be approved by the school district admins or teachers in WebCenter.

- To configure timecards in WebCenter Admin, check out [Setting up Timecards in WebCenter](#).
- For Substitute instructions, check out [Employee: The Timecards Tab](#).
- For Admin/Teacher instructions for approving time, check out [Customer: Reviewing and Approving WebCenter Timecards](#).

Related Articles