

Education Module - WebCenter Substitute Request Setup & Overview

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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.

Note In order for teachers, admins, or substitutes to use WebCenter, they must be given the correct access. Check out [Education Module - WebCenter Setup Overview](#) for more information.

Education Module & Order Request Forms

You can set up your teachers or admins in a school district to be able to request substitutes using WebCenter. Substitutes will then be allowed to review the requests open and accept or reject the assignment.

In this article we will review:

1. [How to Setup an Order Request Form](#)
2. [Additional Order Configs to Consider](#)
3. [How Teachers Submit a Request](#)
4. [How Substitutes Accept Assignments](#)

Setting Up an Order Request Form

In WebCenter Admin, you will need to first create what the form your Admins or Teachers will be filling out to request a substitute.

Create the Form For Your Admins or Teachers to Fill Out

1. In WebCenter Admin, Navigate to the Order Form Tab:



2. Select [\(+\)](#) [New Order Request Form](#)
3. Name the form (ex. Use "Generic Form" for the basic request form that most will use or use [company name] for a specific order form for a customer)

4. Drag and drop any fields you do not want them to fill out to the inactive side

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(+) New Order Request Form ✖ Delete

Entity Form

Entity	Form
Default - 1	Generic
HFStaffing - 150	Minimal Info
HiTech - 2	Crom Equipment
Sales - 65	Basics
CSS - 64	Blissy Cosmetics
	All Fields
	Murphy Construction
	Stillwater School District
	Education Order Request
	Sarah's Order Preferences
	Standard
	Worthington Industries
	Education
	Blissy Cosmetics
	Walker Signs
	High Quality Order
	Lindsey Order Template

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

+ Teacher Name	<input checked="" type="checkbox"/> Required
+ Absence Start Date	<input checked="" type="checkbox"/> Required
+ Absence End Date	<input checked="" type="checkbox"/> Required
+ Absence Start Time	<input checked="" type="checkbox"/> Required
+ Absence End Time	<input checked="" type="checkbox"/> Required
+ Absence Reason	<input checked="" type="checkbox"/> Required
+ Job Title	<input checked="" type="checkbox"/> Required
+ Pay Rate	<input checked="" type="checkbox"/> Required
+ Department Name	<input checked="" type="checkbox"/> Required
+ Start Sub Date	<input checked="" type="checkbox"/> Required
+ 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

Inactive

+ Number of Personnel Required
+ Job Description
+ Purchase Order
+ Shift
+ Worksite
+ Start Date
+ Start Time
+ Duration
+ Supervisor Phone Number
+ Bill Rate

5. Uncheck any fields that are not required

6. Select 

You can create different forms for different school districts, admins, etc. We recommend naming them so they are easily identified by anyone in WebCenter admin.

Choose Which Contacts Use Which Order Form(s)

Now that your order form has been created, you will need to tell WebCenter which admins/teachers/school districts use which form. Remember that Admins/Teachers are considered Contacts and School Districts are considered Customers.

1. In WebCenter Admin, navigate to the Config tab
2. Select the order category on the left
3. Select the show rule option next to **Order Request Form**

Rules

When: is Use:

[Add Rule](#)

Edit	When Customer is Veridian Dynamics (4294999770) HiTech - 2	✘
	Use AJ Order Form	
Edit	When Customer is Murphy Construction (4294999683) HiTech - 2	✘
	Use Murphy 2	
Edit	When Customer is School District 196 (4295012629) HiTech - 2	✘
	Use Stillwater School District	
Edit	When Customer is Worthington Industries (779265) HiTech - 2	✘
	Use Worthington Industries	

4. Create a New Rule

- Select a filter (ex. customer)
- Select a value (ex. customer's name)
- Select the Order Form name (ex. Generic or Customer name)
- Select Add Rule

Note Your Teachers will need to have a WebCenter Role that includes the "Customer - Orders" Permission in order to see the orders tab in WebCenter to create a new request. Check out [Education Module - WebCenter Setup Overview](#)

Setting Up an Order Request Workflow

In some cases, school districts may want to have teachers fill out the request forms to be approved by one or more admins or supervisors before the request is finalized. WebCenter allows for a few different order request processes.

If you do not need to have any approvals for an order request to be submitted:

1. Navigate to WebCenter Admin > Configs Tab > Order category
2. Select the "Show Rules" option to the right of "Order Workflow Type"

Category	Configuration	Default	Actions
Order	Order Workflow Type	Instant Order Approval (Automatically approves submitted order)	Show Rules (9) ▶
	Order Request Form	Generic	Show Rules (15) ▶
	Allow Selecting Of Order Request Approvers	true	Show Rules (1) ▶
	Allow Unlocking of Order Requests	false	Show Rules (4) ▶

3. Select a Filter (ex. customer or user role)
4. Enter a Value (ex. specific school district name, etc.)
5. Select the Order Workflow Type of "Instant Order Approval"
6. Click Add Rule

If you do want to set up a workflow that will require approval from one or more users, you can select a different Order Workflow Type. Check out step one of [WebCenter Admin - Configuring WebCenter Order Requests](#) for more information on the order workflows available.

Turning on the Order Request Forms

Once you have the order form and workflow the way you like, you will need to turn on the ability for users to create order requests. This can be turned on based on School District (Customer) or on a case by case basis for Teachers/Admins (Contacts)

Each Teacher or Admin Will Need:

1. Web User Account (see [Manage Web User Account](#) for more information)
2. WebCenter Contact Role with Order tab available (for more information on contact roles see [WebCenter Contact Roles](#))
3. Have '**Allow Order Request/Copy**' Configuration to be set to 'True'
 - In WebCenter Administration, Navigate to the Configs Tab and choose the Customer category
 - Select the show rules option under Allow Order/Request Copy
 - Create rule by selecting customer or contact, entering customer or contact name and selecting true.
 - Select Add Rule

Additional Order Configs to Consider

If you are looking for more ways to customize the order request process, you can check out the following optional configs located under the WebCenter Admin > Configs > Order category

- **Associate Orders by Department** - This configuration option groups orders by the department they are created in (see [Departments vs. Worksites](#) for more information)

Associate Orders By Department	Default: false	Show Rules (0) ▶
This allows the customer contact to see all orders associated with their department and departments below them in the hierarchy.		

- **Include Open with Filled** - When this configuration is set to 'True' it will show any order with an open status under the filled category for the contact (See [Customer: How to Create and Submit Orders](#) for more information on where and how this displays for the contact).

Include "Open" with "Filled" orders	Default: false	Show Rules (0) ▶
Include orders with a status of "Open" in the "Filled" quickfilter		

- **Allow Unlocking of Order Requests** - When this configuration is set to 'True', it will allow a contact to unlock and edit an order request that may be in the process of being approved.

Allow Unlocking of Order Requests	Default: false	Show Rules (1) ▶
Allow the user to unlock an order request that is in the process of approval to modify details and create a new order request		

- **Check Closure Schedule** configuration is setup for our [Education Module](#) users only and will provide a message at the bottom of any order that includes a closure date based on the school calendar set up on the customer record in Enterprise. Check out [Education Module- Set up in Enterprise](#) for more information on how to set up this calendar.

Check Closure Schedule	Default: false	Show Rules (4) ▶
This will check to see if the order request dates fall within a closure date and if so, don't create the order request		

Submitting a Request for a Substitute

Now that your system is set up to allow teachers/admins to submit requests for substitutes, etc. you can guide your teachers to the Orders tab in their WebCenter portal to create and submit new requests.

1. In WebCenter, navigate to the orders tab
2. Select the **(+) Create Order Request** button near the top of the page
3. A new window will open, fill out all required information

New Order Request

Department Name: Crazy Al's Alligator Wrestling School, Primary (4: ▾)

Job Title: Substitute Teacher 10-12 ▾

Number of Personnel Required: 1

Worksite: Primary ▾

Job Description:

Start Date: 08/25/2020

Bill Rate:

Start Time: 08:00

Shift: Morning ▾

Supervisor: Borg, Al ▾

Purchase Order: --select one-- ▾

Supervisor Phone Number:

[Submit Request](#)

4. Select Submit Request when done

For more information on the Orders tab, check out [Customer: How to Create and Submit Orders](#).

Substitute Requests & Closure Dates

If an order request encompasses school closure dates that are setup on the customer/education/calendar, the submitter will receive a message at the bottom of the order request form, and they will need to change the order dates so that the substitute is not scheduled over a school closure date.

Currently multiple orders will need to be submitted if for example the order is for 3 month maternity leave and during that time there is a two week winter break. The requester would need to enter one order for dates before winter break and another order for dates after winter break.

Below is an example of an order that was attempted to be submitted for dates that span a school closure.

📅 New Order Request ✕

Department Name	Independent School District 83
Worksite	Andersen Elementary
Teacher Name	Mankowski, Kathy
Supervisor	Roberts, Hugh
Start Sub Date	12/27/2017
Start Sub Time	08:00
End Sub Date	12/29/2017
End Sub Time	08:00
Absence Start Date	12/27/2017
Absence Start Time	08:00
Absence End Date	12/29/2017
Absence End Time	16:00
Job Title	Teacher
Absence Reason	Sick
Requested Sub	Jorgenson, Melissa

Date of the request is during a closure date, 2017-12-27.

➔ Submit Request

Check out [Education Module- Set up in Enterprise](#) for more instructions on setting up closure dates.

Accepting an Assignment as a Substitute

When a substitute teacher logs into their WebCenter account they will be able to accept orders that are available to them.

impersonating KATHY (4295067508) | [My Information](#) | [Contact Us](#) | [Stop Impersonation](#)

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WebCenter 6

Home
Orders
Assignments
Calendar
Timecards
Pay History
Documents

Showing 1-1 of 1
« Previous 1 Next »

Start Date	Customer ▲	Worksite	Subject
8/2/2017	ISD 622	North St Paul High	

Showing 1-1 of 1
« Previous 1 Next »

Teacher

Accept Order
Reject

OrderID: 4295067508

Start Time: 8:00 AM

Start Date: 8/2/2017

End Time:

Est. End Date:

Pay Rate: \$18.00

Dress Code:

Customer: ISD 622

Department: (North St. Paul High)

Map: Google Map

Address: 2223 Polar Lane
North Saint Paul, MN 55109

Teacher Name:

Description
Contacts
Directions

sub

Please contact 555-555-5555 with any questions

If the order has required documents and/or interest codes, these can be used to determine whether the job is visible to the substitute. If the substitute lacks an [interest code/required doc](#) that pertains to the order, the order

will not be visible.

After the order has been accepted the substitute may view that assignment from the assignment tab of their WebCenter. Additionally, they will be able to create and submit timecards.

For more information regarding web time card entry check out [Employees: How to Enter and Submit Timecards](#).

Related Articles
